Rhode Island's Access to Recovery

PROVIDER USER MANUAL

VERSION 1.2
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TIPS FOR USING THE APPLICATION EFFECTIVELY

Recommended Computer Settings

Screen Resolutions

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 or larger. If your screen resolution is smaller (e.g., 800 x 600 pixels), everything on the screen will appear larger. But, if you use 800 x 600 pixels you will have to scroll more both up and down and left and right to access all the data fields.

Pop-Up Blockers

Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of Internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like the RI ATR application require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that the RI ATR application may not function or appear properly. You should either disable the pop-up blocker while using the RI ATR application (while remembering to enable it, if desired, when not using the RI ATR application) or create exceptions for the pop-up blocker. Although enabling and disabling the pop-up blocker may be cumbersome, it may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your internet browser window. If using Internet Explorer, click the top toolbar option "Tools" and then go to "Internet Options". After the Internet Options window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab at the bottom will be a section on Pop-Up Blockers. If you "Block pop-ups" checkbox is checked, click on the "Settings" button to allow for exceptions. If using Mozilla Firefox, click the top toolbar options "Tools" and then go to "Options". After the "Options" window is available, you will want to click on the "Content" tab at the top of the window. If you "Block Popup Window" is checked, click the "Allowed Sites" button to the right to allow for exceptions.

You can now add the RI ATR application links to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from the RI ATR application. You will want to add https://kitservices3.kithost.net/riatr/ for the Live system. Once this site is added to your "Allowed Sites" list, the pop-up blocker should no longer prevent pages from loading and appearing while you are using the RI ATR application.

Print Icon

The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on this link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html If you are unable to download Active X, contact your organization's IT department. Firefox does **not** official Support AciveX. http://support.mozilla.com/en-US/kb/ActiveX

*__Note__: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

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Application Navigating

The RI ATR Application is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at Assessment, filling in all the information for that area before moving on to the next section. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

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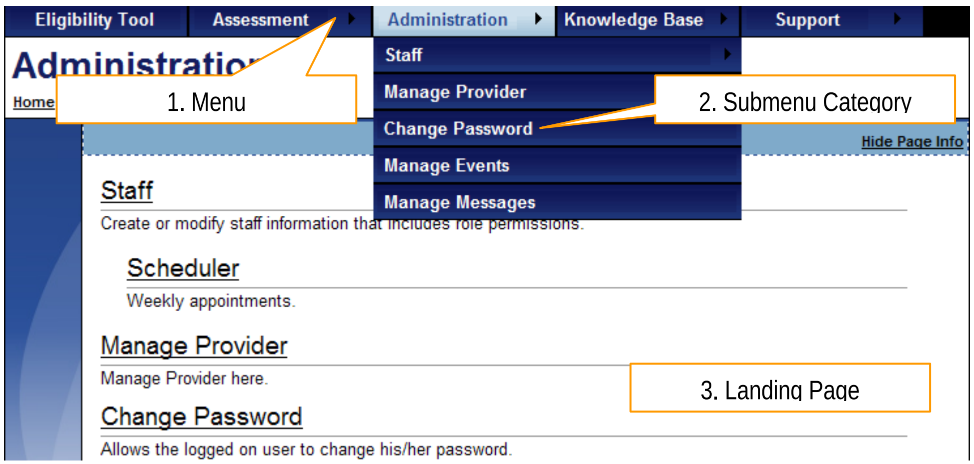
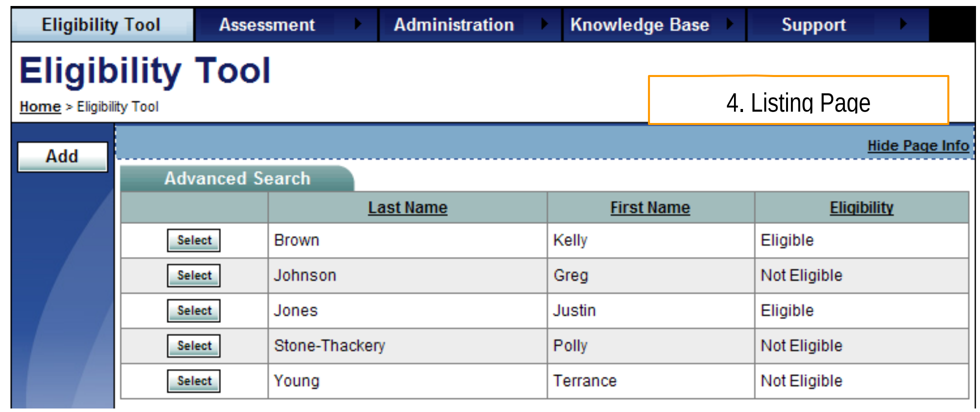
Menu Information

The Menu for theapplication is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the [Landing Page] section.)

1. Menu	Constant (unchanging). Available at all times.
2. Submenu Category	Varies depending on which Menu category is selected.
3. Landing Page	Varies depending on which Menu category is selected.
4. Listing Page	Varies depending on which submenu category is selected.



(This is a screenshot displaying the Menu (1), Submenu (2), and a Landing Page (3))



(This is a sample screenshot displaying a Listing Page (4))

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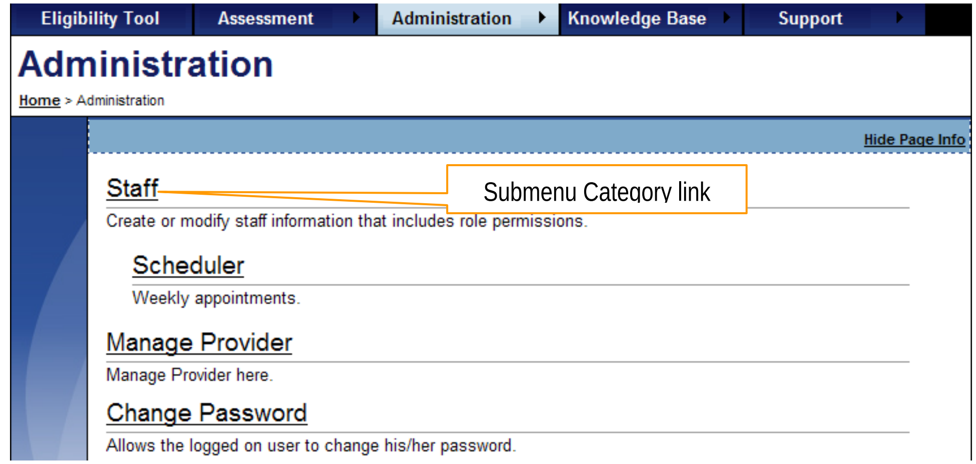
Landing Page

When first entering a main module you will see a list of the entire submenu categories associated with that module. This is called a “Landing Page”. The Landing Page of each module provides a description of what can be done in that module as well as listing each submenu category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the [Listing Page] section.) No data is entered on the Landing Page.

To open a category:

- Click on the Submenu Category Landing Page link.



(This is a partial screenshot displaying a Landing Page)

Tips

- **Hide Page Info** Allows the module description to be hidden from view
- **Show Page Info** Places the module description back in view

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Listing Page

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for Searching. (See the Advanced Search section for more details on searching.)

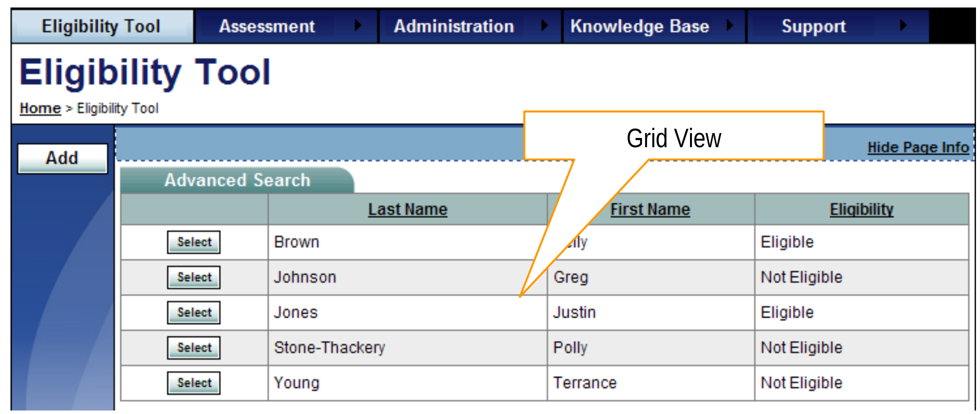
There are three types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

1. When first viewing a Listing Page, all of the data is available for Searching. Click the Select (Select) button to the left of the data you would like to edit/view.
2. You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the Save (Save) button to save the changes.



(This is a sample screenshot displaying a Listing Page)

Tips

- Clicking on the field name in a Category field (e.g., First Name) will allow you to sort through your files in ascending or descending order.
- The Page numbers (e.g. 1 2 3 4 5) beneath the grids allows to you move from page to page within the specific listing page. There is a maximum of 8 items in a grid, so once you exceed 8, the application automatically updates the grid to page 2. To get to a desired page click on the number and you will go to that specified page.

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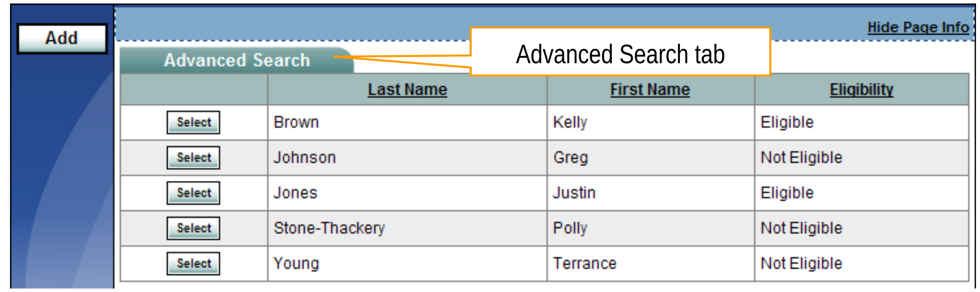
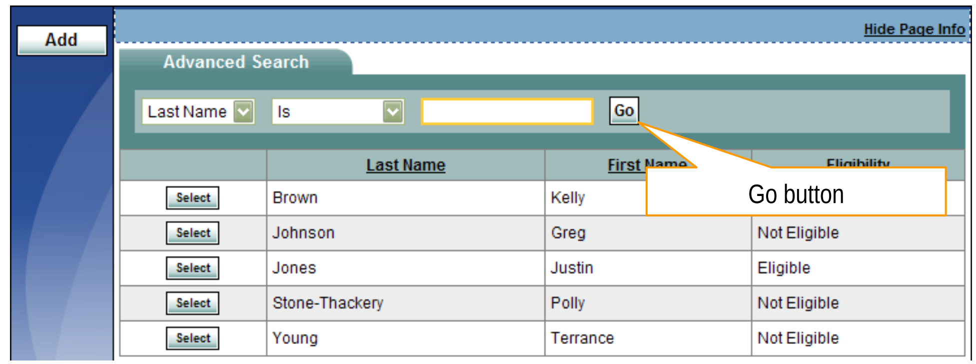
Advanced Search

- To filter a search, click the Advanced Search (Advance Search) tab located at the top of the Grid.



(This is a sample screenshot of a Data Grid displaying the Advanced Search tab.)

- The Advanced Search option allows you to limit search results. Select an option from the three search filter fields. Once the three search filter fields have been selected, click the Go (Go) button to see the search results.
- The three search filter fields are used in the following methods:
    1. The first search filter will display the search categories to choose from.
    2. The second search filter allows you to specify how you wish to search.
    3. The third search filter is the search criteria. This field will change based on the second search filter selected.



(This is a sample screenshot of Advanced Search displaying the **search filter fields**.)

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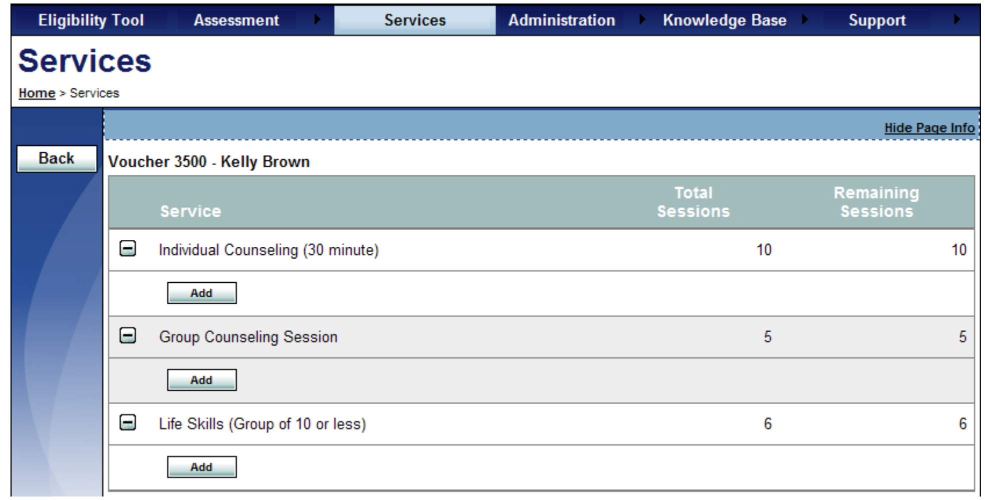
Hierarchy View

A Hierarchical View is used when Adding/Editing within the Service Menu. Looking at the example, the service record is associated with the Treatment Service Type. The hierarchical view was designed to simplify these tasks.

- When first viewing the Listing Page, you will need to click the (**plus sign**) to activate the hierarchy view. The + will become a (**minus sign**)and all the data will display below the link
- To enter, edit or delete information within the link, click on the desired link.

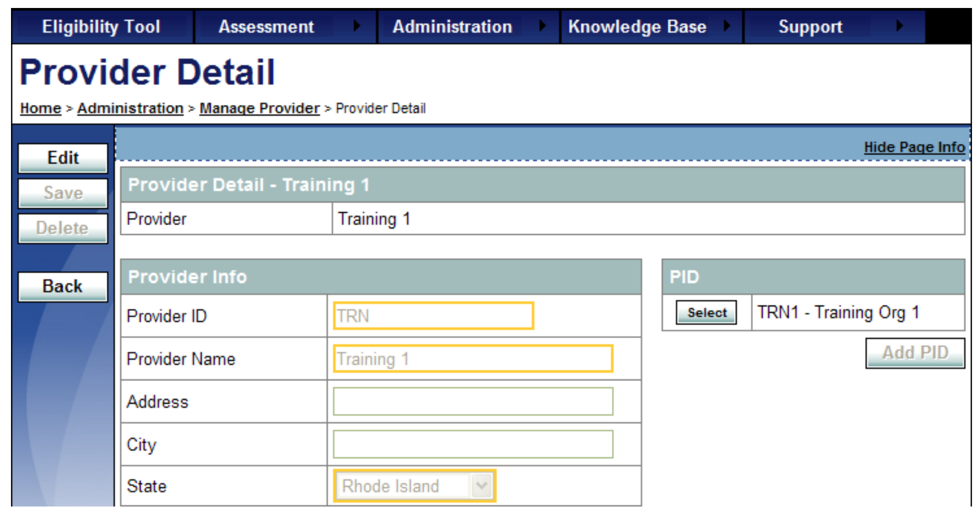


(This is a sample screenshot displaying a "Hierarchy View".

Single Form View

The Single Form View is used when the data entered is updated periodically. Only one form is available and edited. The Single Form View displays the fields on the Edit Form.

- The form can be edited at any time, but you must click the Save (Save) button to update the data.

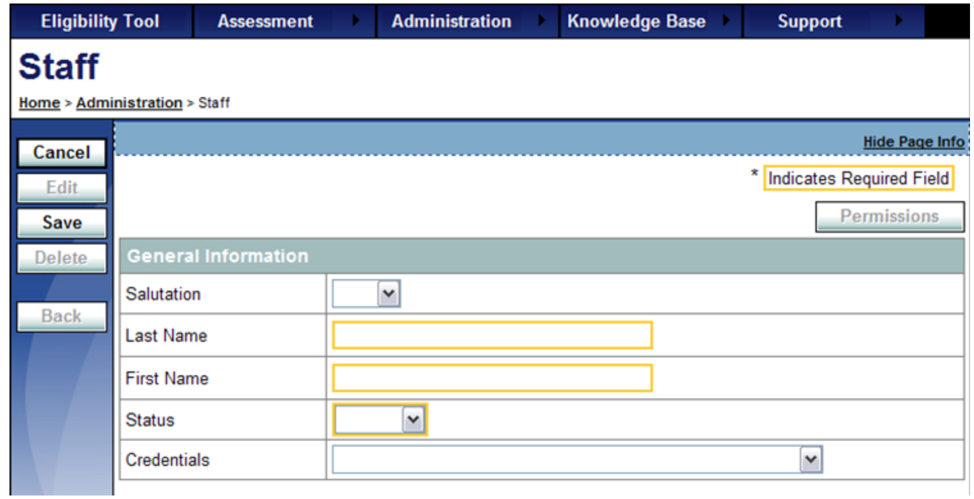


(This is a sample screenshot displaying a "Single Form View" Page.)

Edit Forms

The Edit Form contains the fields for entering and editing data. The buttons for saving, cancelling, deleting, printing, and in some cases, adding and editing, are available at the top right of the page. (See the Data Fields & Buttons section for additional details on the function of these buttons.)

- If you clicked the Add (**Add**) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the Select (**Select**) button to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.



(This is a sample screenshot displaying a blank Edit Form.)

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Data Fields and Buttons

In the RI ATR application there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview/Description
Text Field (aka Text Box)	(fill in the blank)
Dropdown List (aka Pull Down Menu)	Please Select (select one)
Radio Buttons	Selected Not Selected
Check Boxes	Selected Not Selected
First Name	A yellow field denotes a required field
Calendar	(See the Calendar section for additional details.)

It does not matter the order in which the above fields are filled in, but if a required field is not filled in and you try to save the form, you will receive a message informing you what field is missing data and you will not be able to save the form until that field has data.

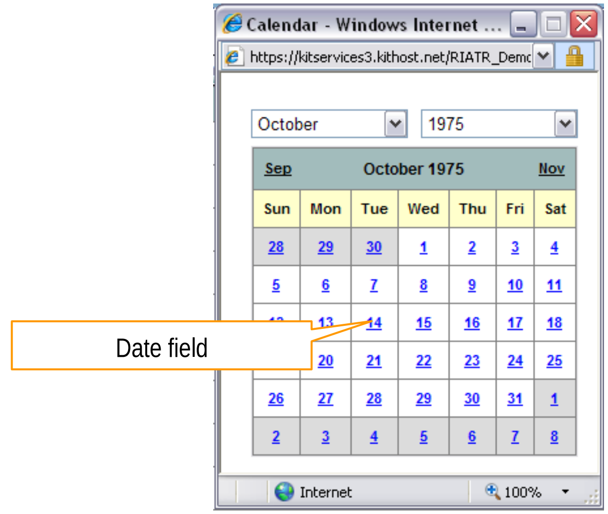
Tips

- All the fields within a yellow box are required fields. These must have a value entered before the record can be saved.
- You can type an identifying letter of an item in a dropdown list and the first selected beginning with that letter will appear in the box.

Calendar

Dates can be entered in two different ways: 1) typing the date directly into a date field or 2) using the (**Calendar**) icon. The (**Calendar**) icon can be used as an alternative option to entering a date directly into a date field.

1. Click the (**Calendar**) icon. A new window will open displaying a calendar.
2. To change the month, use the month links on the top corners of the calendar.
    a. Click the left month link to go to the previous month.
    b. Click the right month link to go to the upcoming month.
    c. If the date is not within the months displayed, you can select the Month and Year by using the dropdown lists.
3. Once the correct month is displayed, select the date by clicking on a number within the calendar.



(This is a screenshot displaying the calendar feature.)

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Edit Form Buttons

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information located to the left of each form. This is referred to as the "left toolbar".

Add	Must be pressed first to add new information to a form
Edit	Must be pressed to modify existing information
Save	Adds the information on a form to the RI ATR database
Delete	Removes the information currently on a form from the RI ATR database
Cancel	Cancels the Add or Edit without saving any information entered

Additional Buttons

Below are some additional buttons that may appear within a form.

Back	Returns you to the Listing Page
Submit	Forwards the approved information to the appropriate parties for further consideration.
Export	Downloads the selected file into the desired format.
Select	Opens the information in the enter/edit form for viewing or modifications
A A A A	Changes the text size by clicking on one of the different sized As (For more information, see the Using the Text Resizer section)

Using the Text Resizer

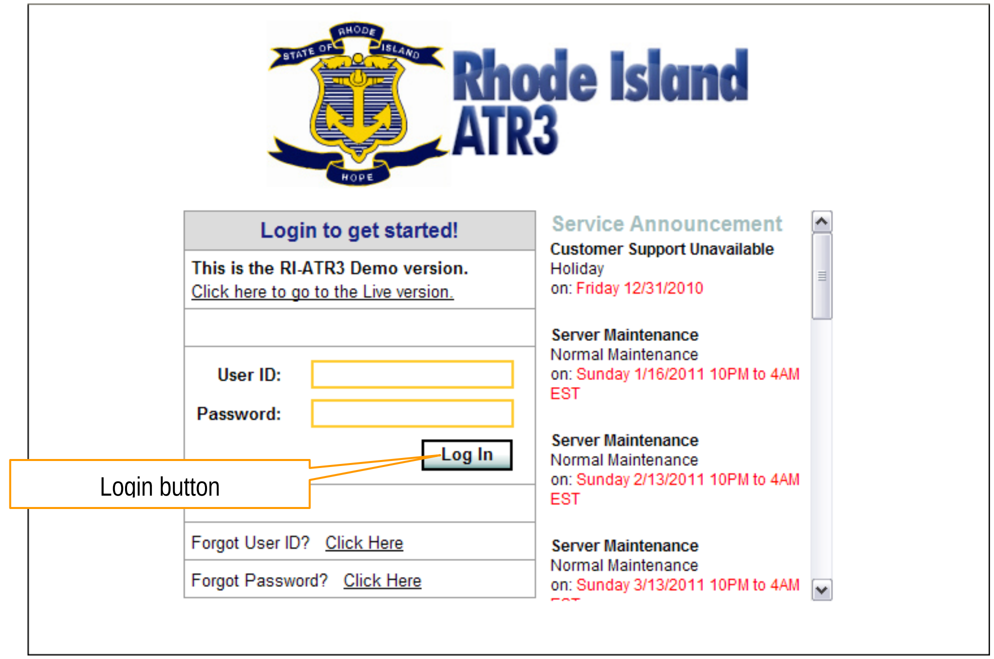
You can alter the size of the text on a form by using the Text Resizer AAAA. Clicking on one of the As changes the text size from smallest to largest. Place the mouse pointer over one of the As and left click to change the size.

A	Provides the smallest text size
A	Provides the default text size
A	Provides a medium text size
A	Provides the largest text size

LOGIN PROCEDURE

Connect to the Internet using an Internet browser. In the Address field, type in the following address and press Enter on your keyboard:

Live Data: https://kitservices3.kithost.net/riatr/



(This is a screenshot of the Login page)

1. Type the login name provided by your acting administrator in the **User ID*** field.
2. Type the password in the **Password*** field.
3. Click the Log In (**Login**) button.

Tips

- The **User ID*** IS NOT case sensitive.
- The **Password*** IS case sensitive.

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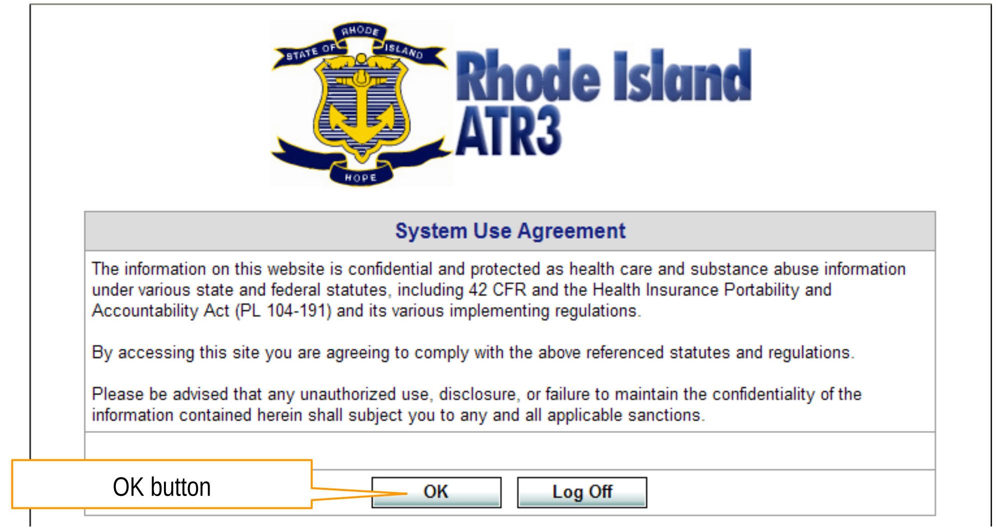
4. To enter, you must read and agree to the System Use Agreement by clicking the OK (Ok) button.
*Note: If you do not wish to log in, click the Log Off (Log Off) button.

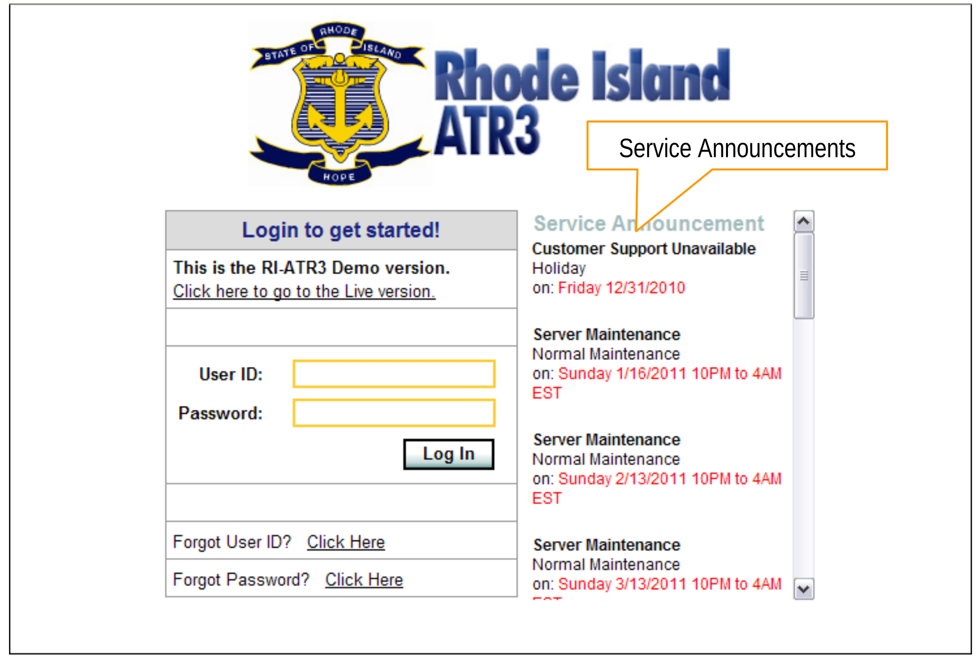


(This is a screenshot of the System Use Agreement Screen)

Service Announcements

The Service Announcements that are located on the Login Page are there to notify users that the Service is receiving any necessary server updates. The Service may be down for a short period of time which means you will not be able to log into the Service or save any data at that time.

Service Maintenance typically occurs once a month.



(This is a screenshot of the Login page)

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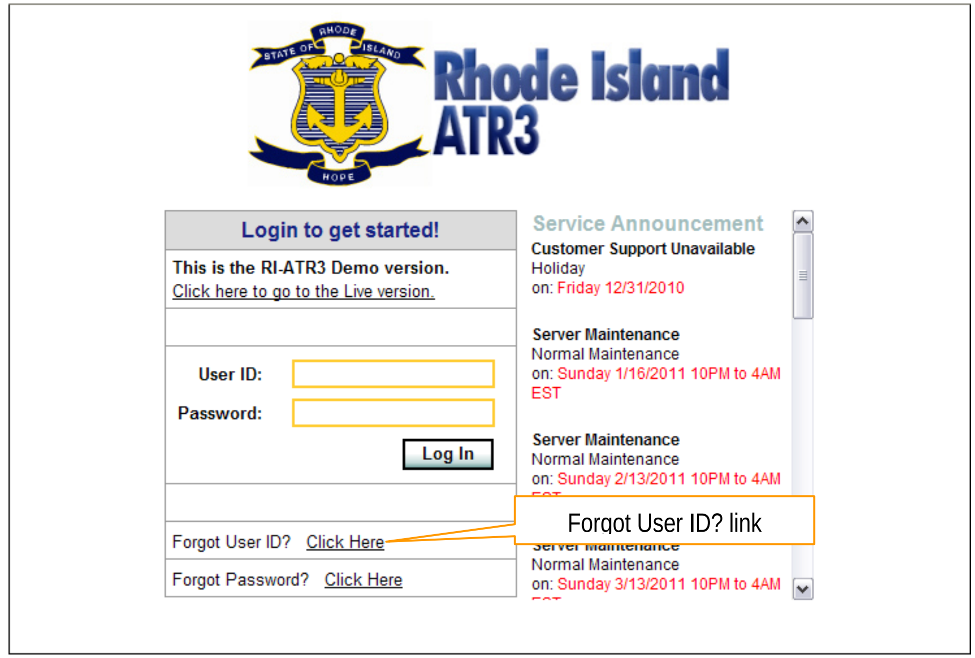
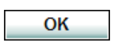
Forgot User ID?

If you are unable to log into the RI ATR application due to forgetting your User ID, you can retrieve this information by clicking the link (entitled <u>Click Here</u>) next to Forgot User ID?



(This is a screenshot of the Login page)

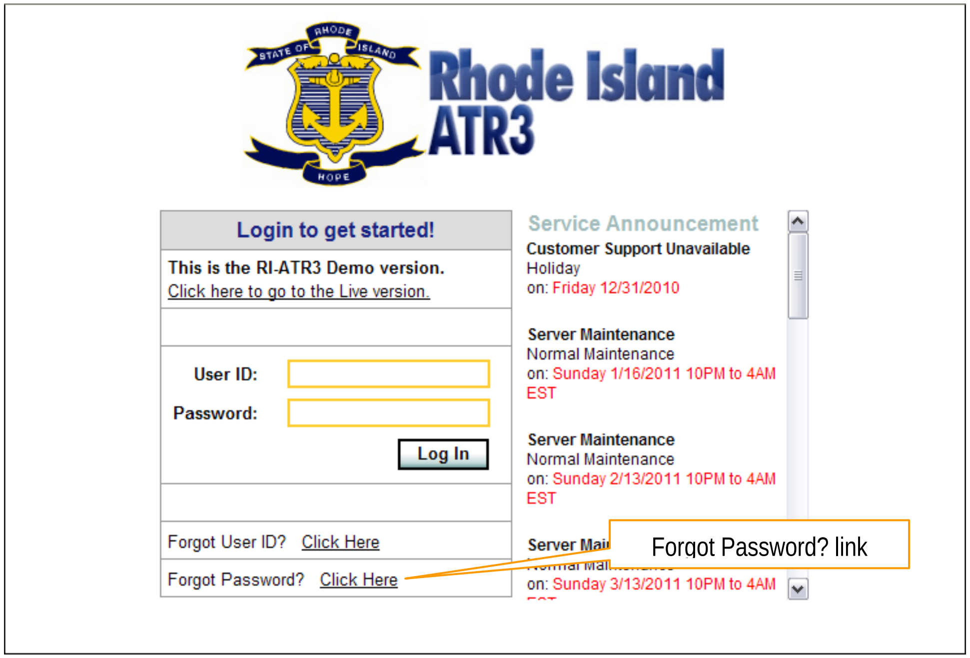
1. Enter the email address associated with your account in the **E-mail Address** field.
2. Click the  (OK) button.

(This is a screenshot of the User ID Recovery screen)

You will receive a message that User ID information was sent to the email address specified. An email will then be sent supplying you with the User IDs associated with the specified email address.

Forgot Password?

If you are unable to log into the RI ATR application due to forgetting your Password, you can retrieve this information by clicking the link (entitled <u>Click Here</u>) next to Forgot Password?



(This is a screenshot of the Login page)

3. Type the login name provided by your acting administrator in the User ID* field.
4. Click the OK (OK) button.

(This is a screenshot of the Password Recovery Screen)

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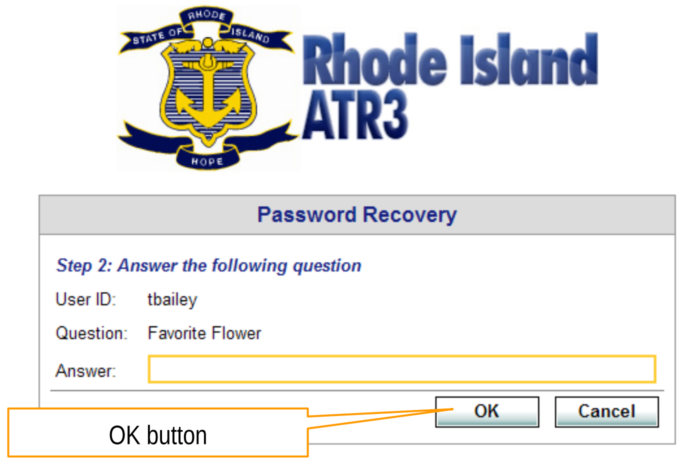
5. Enter the answer to the password question you specified when your account was activated in the **Answer:** field.
6. Click the OK (OK) button.

You will receive a message that your password has been reset. An email will be sent to the email associated with the User ID with a link to reset the password. See Account Activation for details on resetting your password.



(This is a screenshot of the Password Recovery Screen)

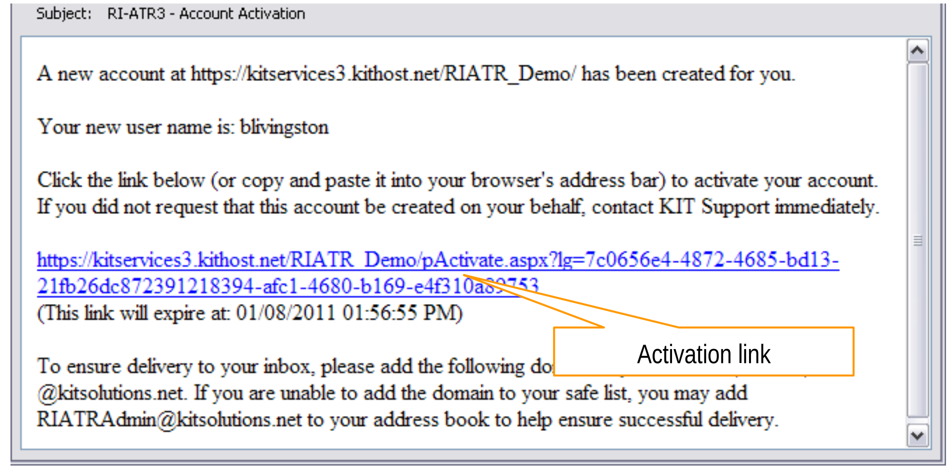
Tips

- If you have not activated your account, you will not be able to use the Forgot Password feature.
- Password Answers are case-sensitive.

Account Activation

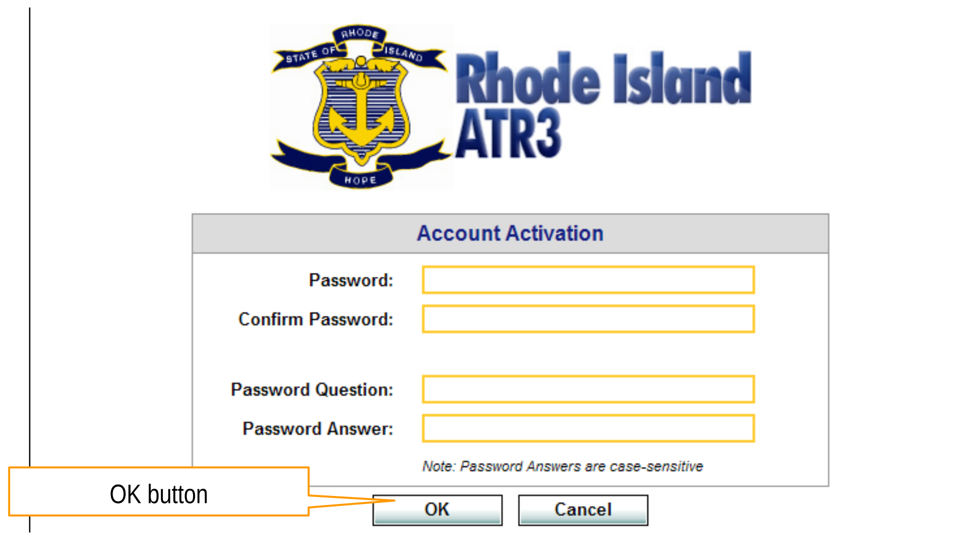
Your login information is created for you by your system administrator (IT Manager). In order to log into RI ATR for the first time you will need to activate your account first.

1. Once you have been informed by your system administrator that an account was created for you, check your email's inbox. You should receive an email with instructions for activation.
2. Click the activation link within the email to activate your account.



(This is a sample screenshot of the activation email)

3. Enter your password into the **Password** field. It must contain the following:
   a. Minimum 8 characters in length
   b. Must have 1 upper case character
   c. Must have 1 number
   d. Cannot use User ID as part of password
4. Retype the password in the **Confirm Password** field.
5. Enter your password question into the **Password Question** field.
6. Enter your password answer into the **Password Answer** field.
7. Click the OK (OK) button. You will now be taken to the Login Page.
   *Note: You will receive a confirmation email that your account has been activated.



(This is a screenshot of the Account Activation Screen)

Tips

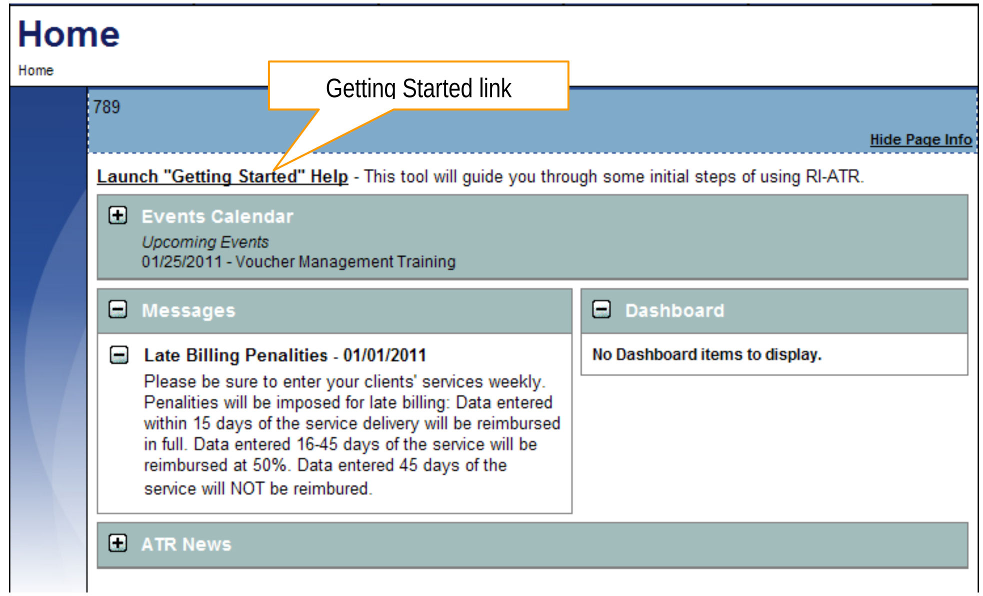
- The activation link is only available for 72 hours. If you did not click the link in time, contact your system administrator to reset your password.
- If you used the Forgot Password feature, the Password Question and Password Answer will already be filled in for you based on your activation. You may change this information if desired.

HOME

The Home Page provides the organization with important messages, upcoming events and links to News regarding treatment.

Getting Started

- To view a guide through the initial steps of using the RI-ATR application, click on the Launch “Getting Started” Help link.
- A new window will open displaying some basic information about the RI ATR application.
- To close the window, click on the (X) in the upper right hand corner.



(This is a sample screenshot displaying the Home page)

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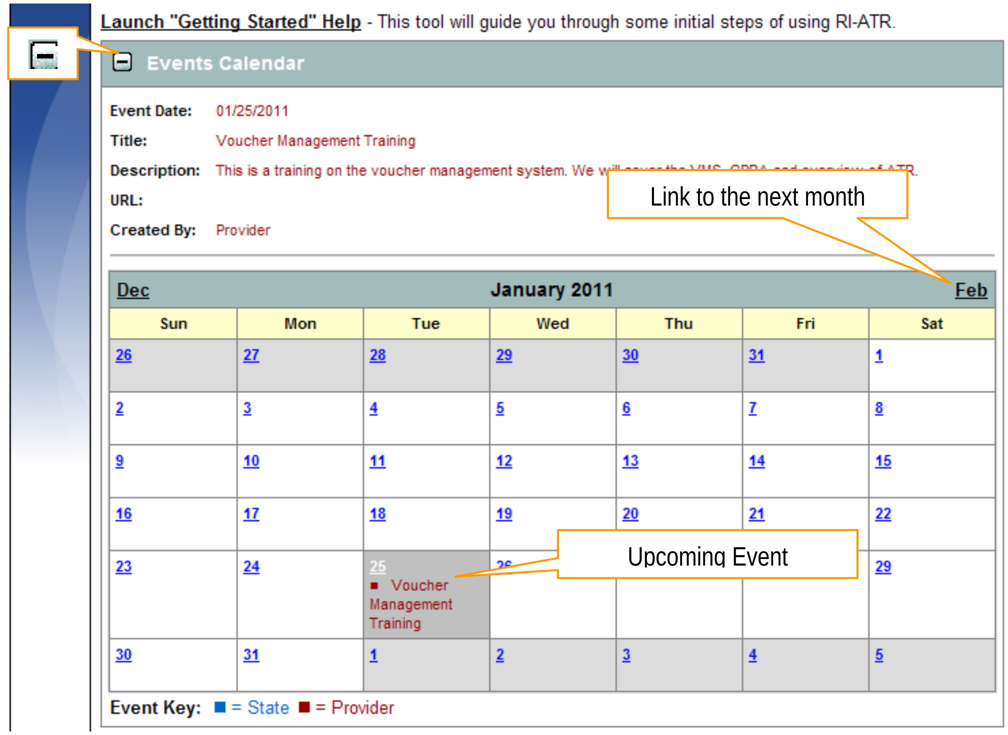
Events Calendar

- To view the events calendar, click on the (**plus sign**) next to the Events Calendar.
- The Calendar will expand.
- To view Event details for a particular day, click on the calendar date (e.g., 25).
- Switch to the previous or next month by selecting the link located to the right or left of the current month's name.
- To close the calendar, click on the (**minus sign**).
  *Note: To add events to the calendar, see the Manage Events section.



(This is a sample screenshot displaying the Events Calendar)

Tips

- If an event is added by the state, then the event will display for all providers, regardless of their permission level.

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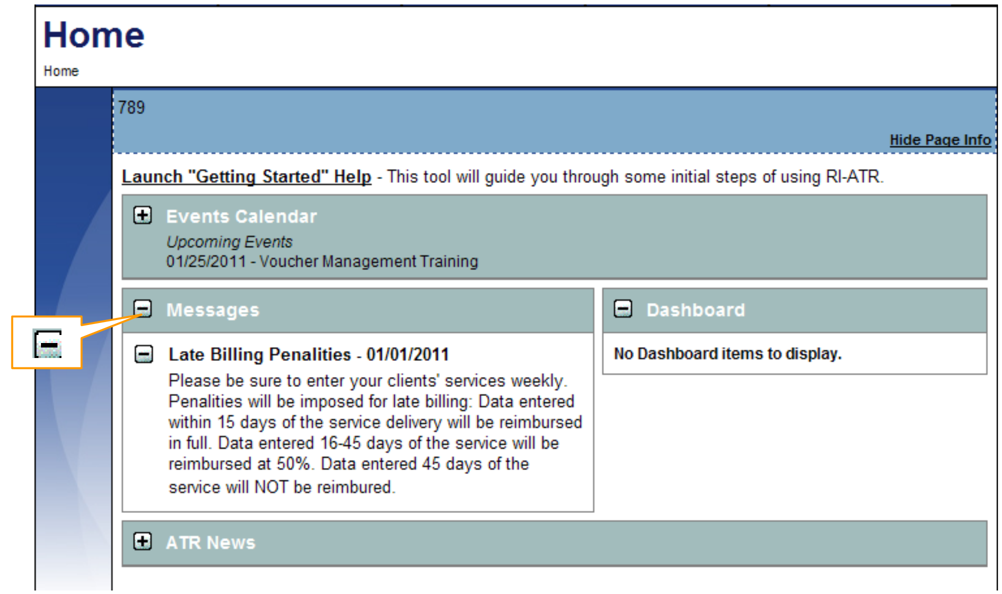
Messages

- To view a Message description, click on the ⊞ (plus sign) next to the message title. The ⊞ (plus sign) will become a ⊟ (minus sign). To close the description, click on the ⊟ (minus sign).
  *Note: To add messages to the Home page, see the Manage Messages section.

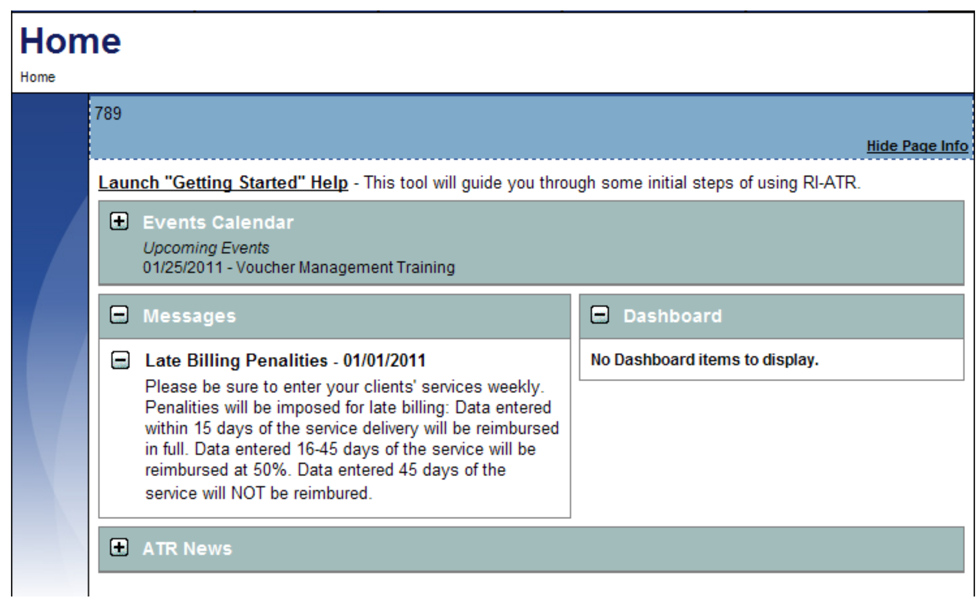


(This is a sample screenshot of the Home Page displaying an open message.)

Dashboard

The Dashboard feature on the home page is designed to provide status updates in regards to various timeliness, notifications and inactivity scenarios for reports and surveys within the ATR Application.

- To view a list of dashboard reports, click on the ⊞ (plus sign) next to the Dashboard. The ⊞ (plus sign) will become a ⊟ (minus sign). To close the list of reports, click on the ⊟ (minus sign).



(This is a sample screenshot of the Home page displaying the Dashboard.)

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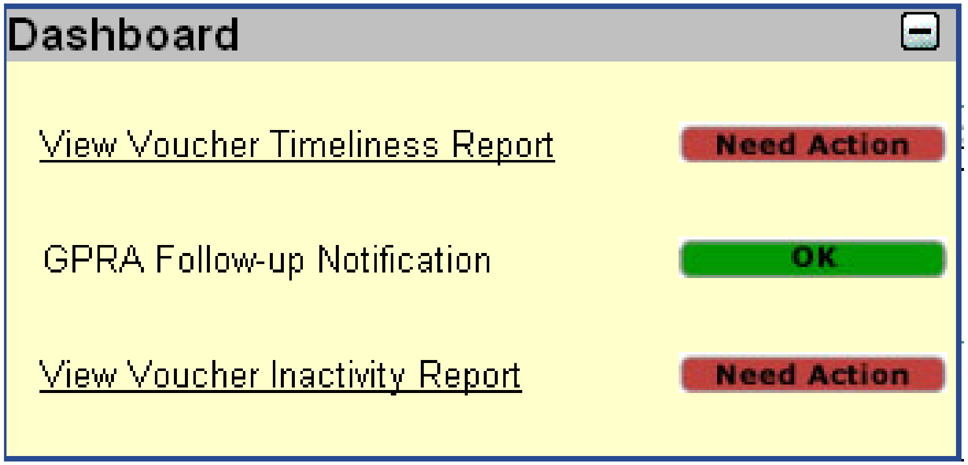
Voucher Timeliness

This report shows all vouchers with no services within 20 days of being issued

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days



(This is a sample screenshot of the Dashboard notifications on the Home Page.)

GPRA Follow-Up Notification

This report shows all vouchers that are 4.5 months (135 days) past voucher issue.

1. Green=0-134 days
2. Yellow=135-180 days
3. Red='181+ days

Voucher Inactivity

This report shows all vouchers that have no services for at least 20 days.

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days

Tips

- Green – No Action Needed
- Yellow – Alert. A link is available for the report or survey that falls within this status.
- Red – Action. A link is available for the report or survey that falls within this status.

ATR News

- To view a list of News articles, click on the (**plus sign**) next to the ATR News. The (**plus sign**) will become a (**minus sign**). To close the list of articles, click on the (**minus sign**).
- To view a News article, click on the title of the article from the **ATR News** section. ATR News section is automatically updated in 'real-time' by JoinTogether.
- A new window will open when you click on the specified news article link.
- To close the window, click on the (X) in the upper right hand corner or click the Close (**Close**) link.

(This is a sample screenshot of the Home page displaying the ATR News links)

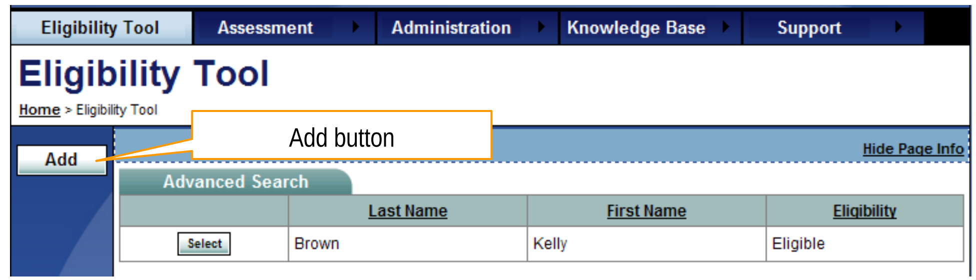
Tips

- If no news articles appear when click the (**plus sign**), click the link located at the bottom of the page to enable the news feed.

  You are NOT viewing the news feed which results in better page performance. Click **here** to re-enable the news feed.

ELIGIBILITY TOOL

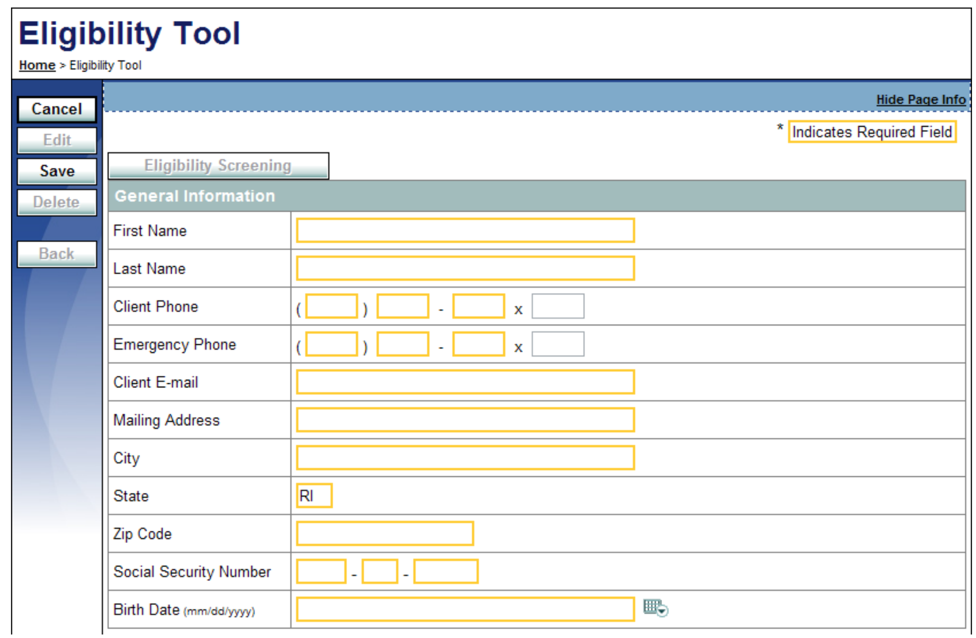
The Eligibility Tool module is designed to create a client profile and determine their eligibility for treatment.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

Adding a Client

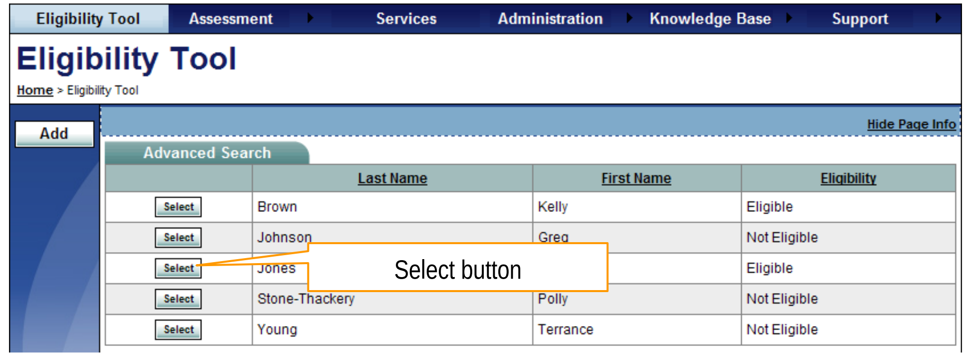
1. Click **Eligibility Tool** from the Menu.
2. Click the Add (**Add**) button.
3. Enter the client's first name in the **First Name** field.
4. Enter the client's last name in the **Last Name** field.
5. Enter the client's telephone number in the **Phone** fields.
   *Note: The Phone must be filled out in three fields. The fourth field is optional for an extension number.
6. Enter the client's emergency telephone number in the **Emergency Phone** field.
   *Note: The Emergency Phone must be filled out in three fields. The fourth field is optional for an extension number.
7. Enter the client's email address in the **Client E-mail** field.
8. Enter the client's address in the **Address** field.
9. Enter the client's city in the **City** field.
10. The **State** field is defaulted to RI.
11. Enter the client's 5 digit zip code in the **Zip Code** fields.
12. Enter the client's social security number in the **Social Security Number** field.
13. Enter the client's date of birth in the **Birth Date*** field as mm/dd/yyyy or select the date by clicking on the calendar . (See Calendar section for further details)
14. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any details, click the Cancel (Cancel) button.
15. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Eligibility Tool edit form.)

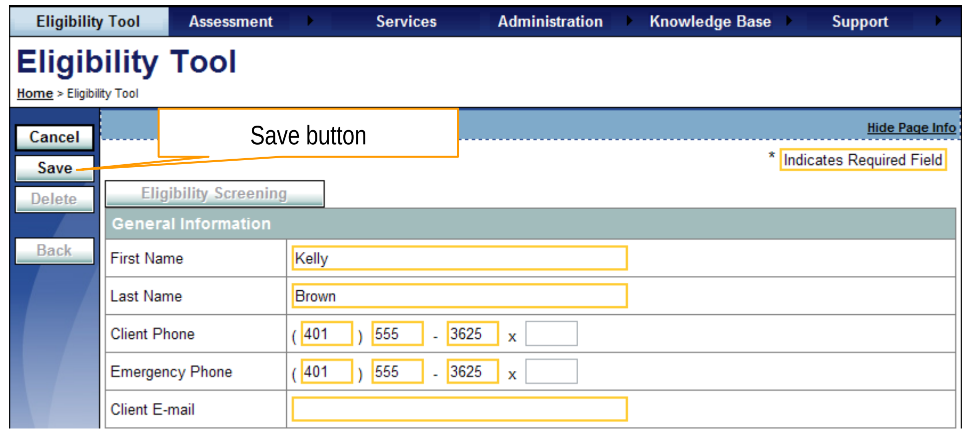
Editing a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to edit by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

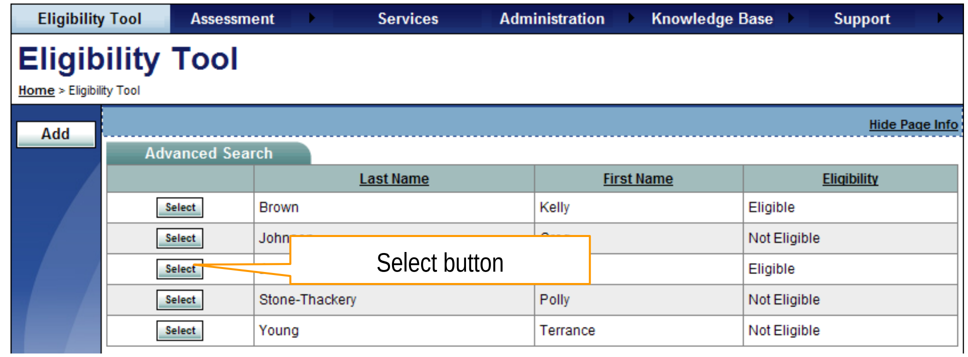
3. Click the Edit (**Edit**) button from the left toolbar.
4. The client will appear in the edit mode.
5. Make any changes needed to the details.
6. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Eligibility Tool edit form.)

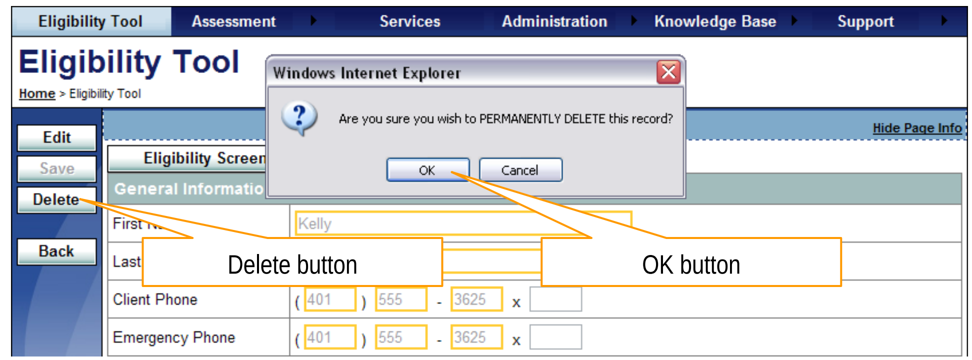
Deleting a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to delete by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Click the Delete (**Delete**) button from the left toolbar.
4. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the client.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.
5. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Eligibility Tool edit form.)

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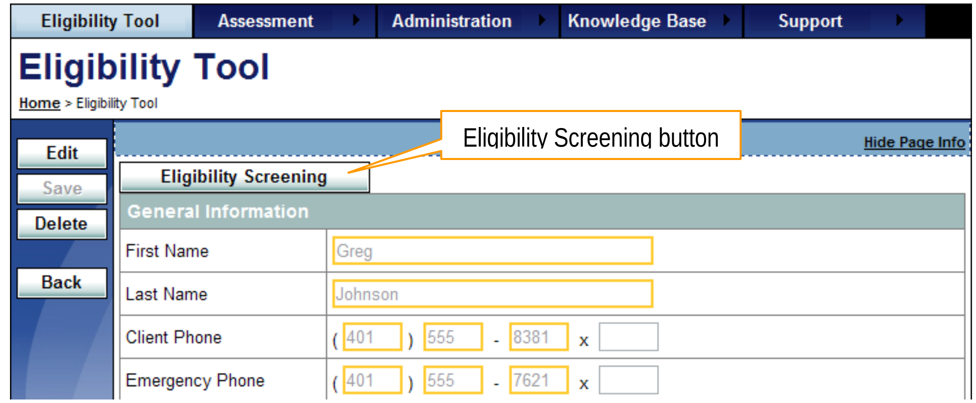
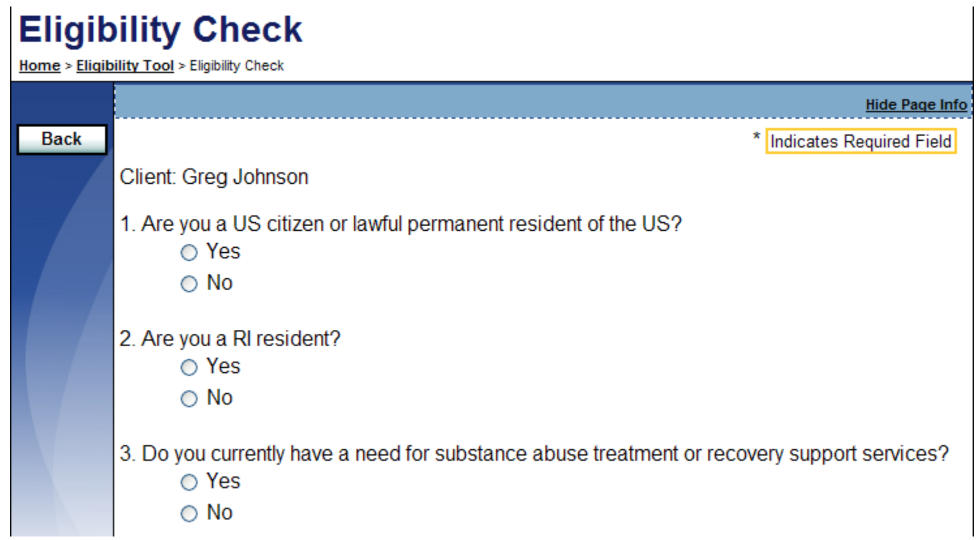
Eligibility Screening

Once a client profile has been saved, the Eligibility Screening (**Eligibility Screening**) button will become available to check the client's eligibility for treatment.

1. From the Eligibility Tool Edit form, click the Eligibility Screening (**Eligibility Screening**) button.



(This is a sample screenshot of the Eligibility Tool Edit Form.)



(Partial screenshot of the Eligibility Check Edit Form.)

2. Answer each of the questions that appear.
3. Click the Check Eligibility (**Check Eligibility**) button at the bottom of the page.
4. Click the Back (**Back**) button to return to the Eligibility Tool edit form.

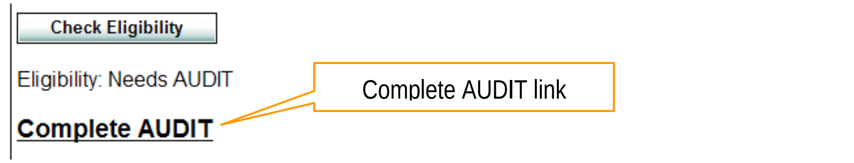
Tips

- The client will considered eligible for treatment based on his/her US citizenry, RI residency, and monthly income based on family size.

Complete AUDIT

If a client is deemed eligible for treatment, the AUDIT will need completed.

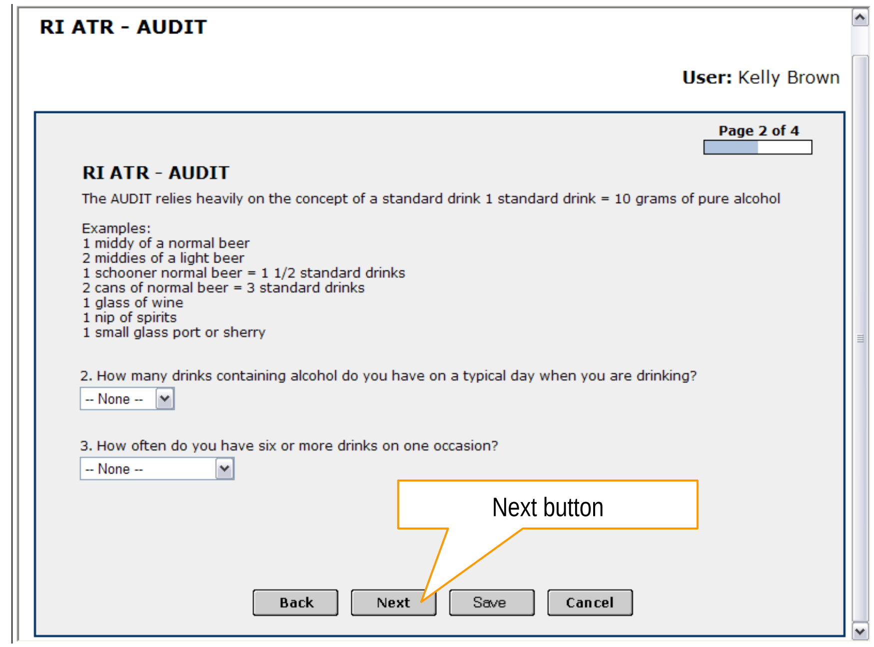
1. From the Eligibility Check Edit form, click the **Complete AUDIT** link.



(This is a sample screenshot of the Eligibility Check Edit Form.)

2. From the Eligibility Check Edit form, click the **Complete AUDIT** link.
3. Answer each of the questions that appear.
4. Click the Next (**Next**) button to go to the next page of questions or click the Back (**Back**) button to return to the previous page.
5. Click the Done (**Done**) button when you've completed the questions.
   *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.

> *Note: The **Progress Bar** at the top of each page shows how much of the survey has been completed.

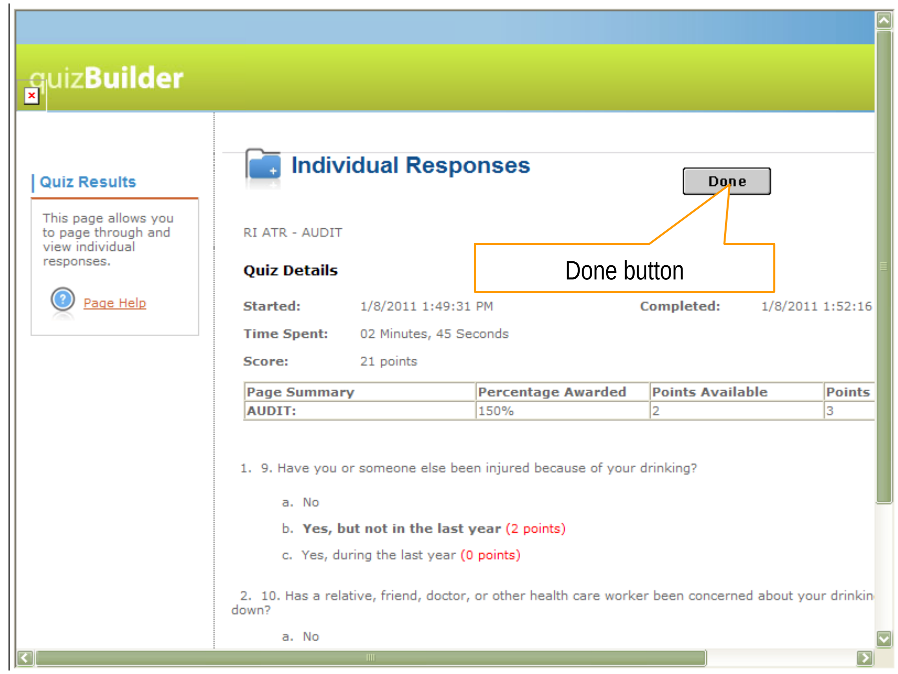


(This is a sample screenshot of the AUDIT Edit Form.)

Tips

- You can click the Save (**Save**) button at anytime. If you have not completed the entire AUDIT, when you return it will start on the next page that needs completed.
- Clicking the Save (**Save**) button on a page will also act as the Next (**Next**) button.

6. Once you have completed the AUDIT and clicked the Done (Done) button, you will be taken to the Individual Responses page to view the results. Click the Done (Done) button when you are finished.
7. Click the Back (Back) button to return to the Eligibility Tool edit form.



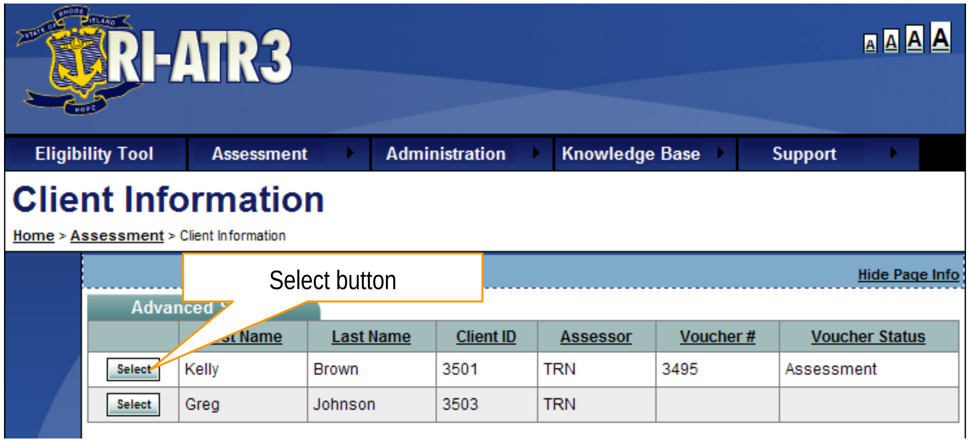
(This is a sample screenshot of the AUDIT Edit Form.)

ASSESSMENT

The Assessment module is designed to register and track client information within the application.

Client Information

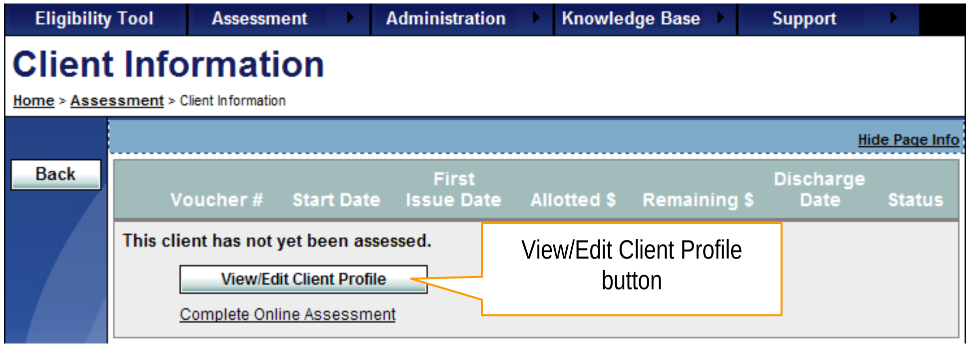
Use the Client Information form to add/edit and delete information for clients within the application



(This is a sample screenshot of the Client Information Listing Page.)

Updating Client Information

1. Click **Assessment** from the Menu.
2. Click **Client Information** from the Assessment Landing Page.
3. Click the Select (**Select**) button to the left of the appropriate client.



(This is a sample screenshot of the Voucher Information Listing Page.)

4. Click the View/Edit Client Profile (**View/Edit Client Profile**) button.

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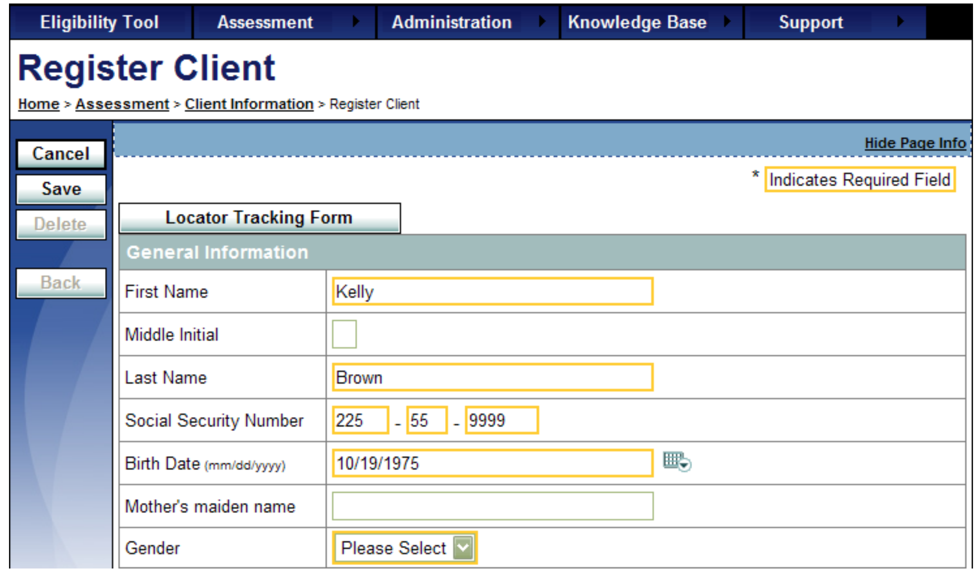
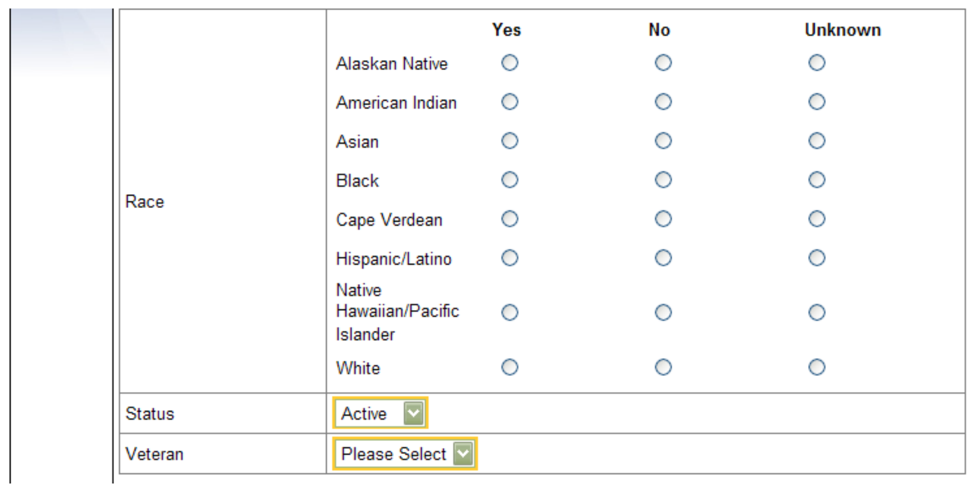
5. Click the (**Edit**) button from the left toolbar.
6. Some fields will be filled in for you based on the client profile entered in the Eligibility Tool.
7. Update the client's **General Information**.
    a. Enter the client's first name in the **First Name*** field.
    b. If desired, enter the client's middle initial in the **Middle Initial** field.
    c. Enter the client's last name in the **Last Name*** field.
    d. Enter the client's social security number in the **Social Security Number*** field.
    e. Enter the client's date of birth in the **Birth Date*** field as mm/dd/yyyy or select the date by clicking on the calendar . (See [Calendar](#) section for further details)
    f. If known, enter the client's Mother's maiden name in the **Mother's maiden name** field.
    g. Select the client's **Gender*** using the dropdown list.



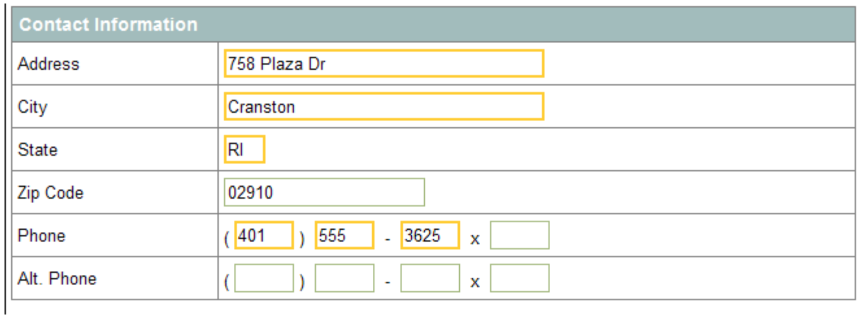
(This is a sample screenshot of the Register Client edit form.)

    h. Select the client's race using the **Race*** radio buttons.
    i. The **Status*** is defaulted to *Active*.
        i. *Active*: the client is currently receiving treatment (can be viewed on other screens and reports).
        ii. *Inactive*: the client is no longer receiving treatment (will no longer appear on other screens and reports).
    j. Select the client's veteran status from the **Veteran** dropdown list.



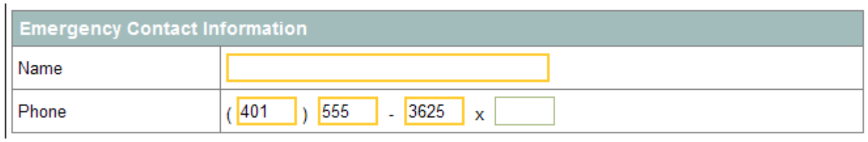
(This is a screenshot of the Register Client edit form.)

8. Update the client's **Contact Information**.
    a. Enter the client's address in the **Address*** field.
    b. Enter the client's city in the **City*** field.
    c. The **State*** field is defaulted to RI.
    d. Enter the client's 5 digit zip code in the **Zip Code*** fields.
    Note: Enter the Zip Code extension in the second box for the Zip Code field, only the 5 digits are required.
    e. Enter the clients area code and extension in the **Phone*** field.
    f. If desired, enter and alternative phone number in the **Alt. Phone** fields.



(This is a sample screenshot of the Register Client Contact Information fields.)

9. Update the client's **Emergency Contact Information**.
    a. Enter the client's emergency contact name in the **Name*** field.
    b. Enter the client's emergency area code and extension in the **Phone*** field.
10. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.
11. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Register Client Emergency Contact information fields.)

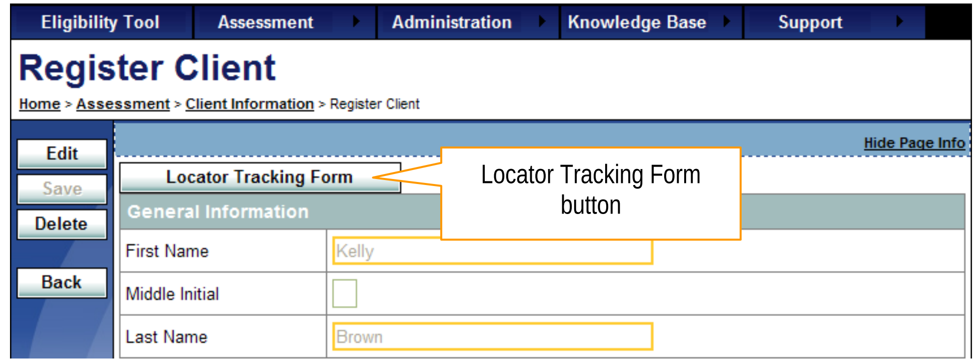
Tips

- Once the Client Information has been updated, the client will receive a voucher number.

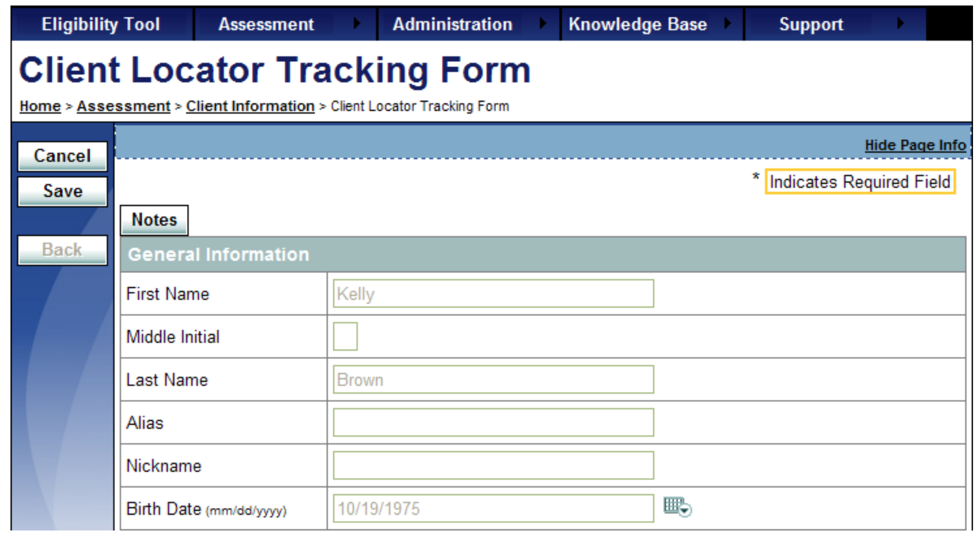
Locator Tracking Form

The Locator Tracking Form is used to gather further information about a client. This form is not required, but highly suggested so the client can be found for their 6 month follow-up.

1. From the Register Client edit form, click the Locator Tracking Form (**Locator Tracking Form**) button.



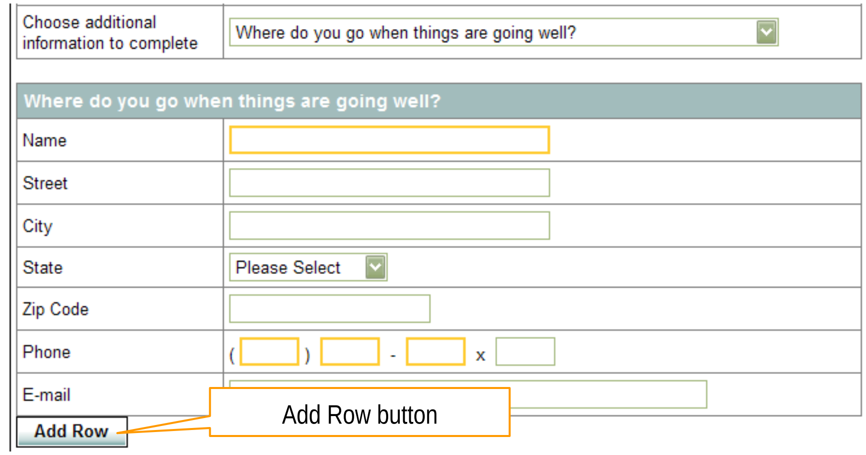
(This is a sample screenshot of the Register Client edit Form)



(This is a sample screenshot of the Locator Tracking Form)

2. Click the Edit (**Edit**) button from the left toolbar.
3. The required fields (i.e. **First Name**, **Last Name**, **Birth Date** and **Social Security Number**) are automatically filled in with the information that was entered in the Register Client screen.
4. Enter in additional information in the optional fields.

5. The **Choose additional information to complete** dropdown list allows you to answer multiple different questions pertinent to the client.
    a. Select a question from the **Choose additional information to complete** dropdown list. New fields will appear.
    b. Fill in the required fields and any optional fields you desire.
    c. Click the Add Row (**Add Row**) button.

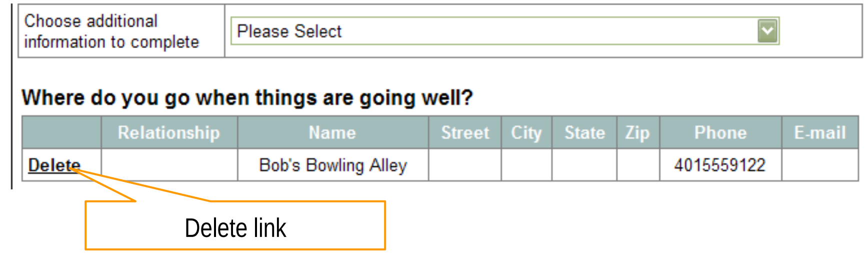


(This is a sample screenshot of the Locator Tracking Form.)

d. A grid will appear displaying the question and answers. To delete the record, click the **Delete** link.

e. Repeat steps a-c for each question you wish to add for the client.

6. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
7. Click the Back (**Back**) button to return to the Register Client edit form.



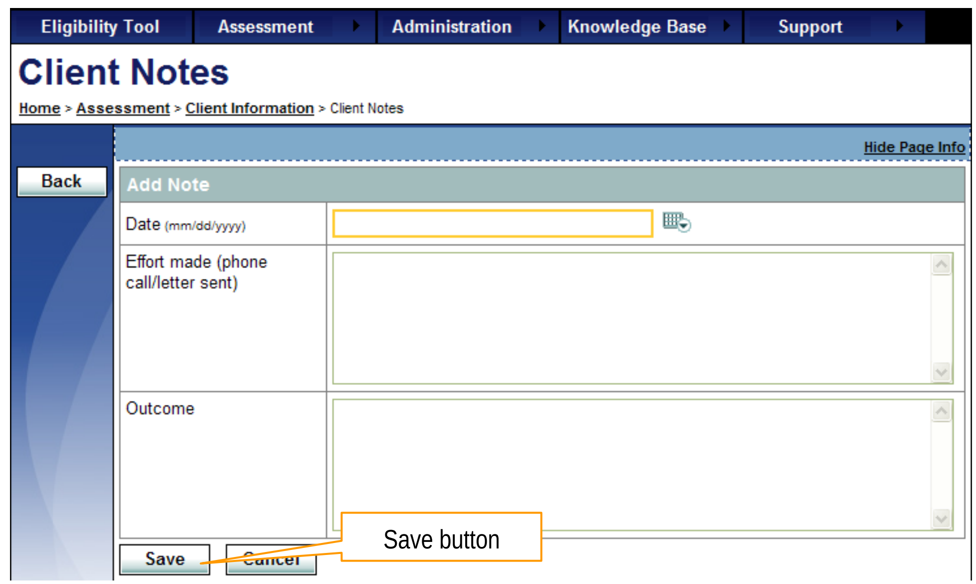
(This is a sample screenshot of the Locator Tracking Form.)

Tips

- All required fields are defaulted from the Register Client Page.

Tracking Form Notes

1. Click the Notes (**Notes**) button from the top of the Client Locator Tracking Form Edit form.
2. Click the Add (**Add**) button.
3. Enter the **Date*** as mm/dd/yyyy or select the date by clicking on the calendar . (See Calendar section for further details)
4. Enter notes into the **Effort Made** field.
5. Enter notes into the **Outcome** field.
8. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
6. To remove a record, click the Delete (**Delete**) button.
7. Click the Back (**Back**) button to return to the Locator Tracking form edit form.

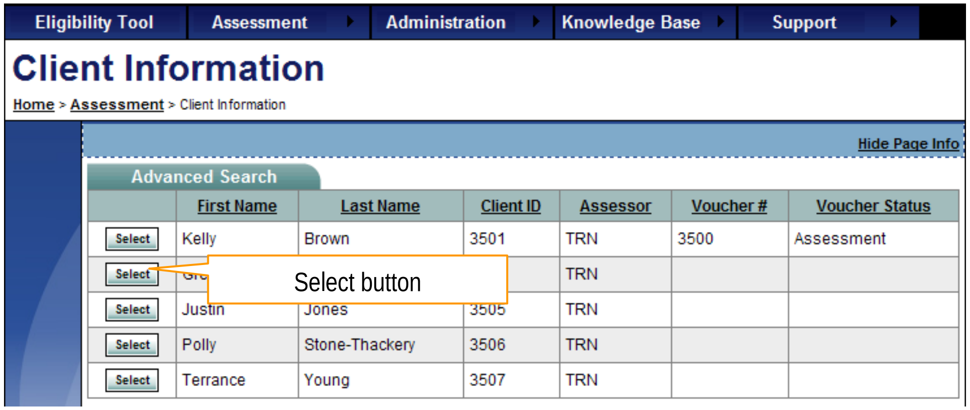


(This is a sample screenshot of the Client Locator Tracking Form Notes page.)

Voucher Information

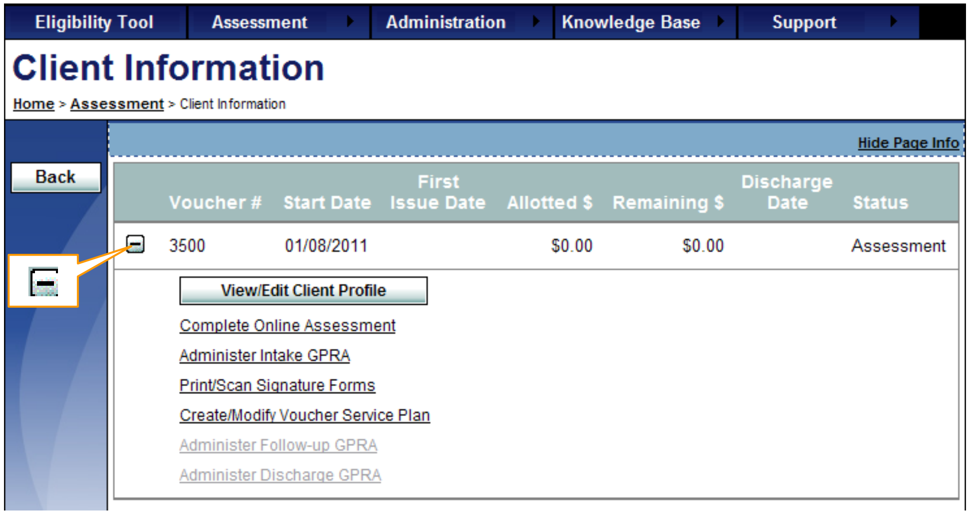
The Voucher Information module is designed to enter forms and information related to each client within the application.

1. Click **Assessment** from the Menu.
2. Click **Client Information** from the Assessment Landing Page.
3. Click the Select (**Select**) button to the left of the appropriate client.



(This is a sample screenshot of the Client Information Listing Page.)

1. The screen is defaulted to open with the ⊟ (**minus sign**) to the left of the Voucher #, which has the Voucher Information expanded.
2. To continue with entering the client's voucher information, you will need to click on the links (e.g. <u>Complete Online Assessment</u>) to enter the necessary client data.
   *Note: Click on the ⊟ (**Minus** sign), it becomes a ⊞ (**Plus** sign) with the links no longer displaying. To make the links available click on the ⊞ (Plus sign).
3. Click the Back (**Back**) button to return to the Listing page.



(This is a partial screenshot of Voucher Information Listing Page.)

Tips

- The links on the Voucher Information page (e.g. Complete Online Assessment, Administer Intake GPRA, Print/Scan Signature Forms) are linked to the client.

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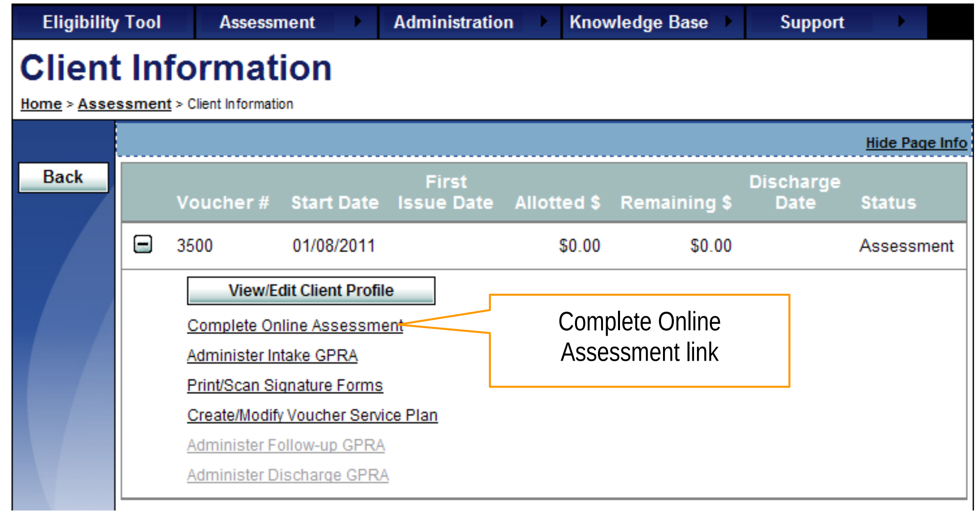
Complete Online Assessment

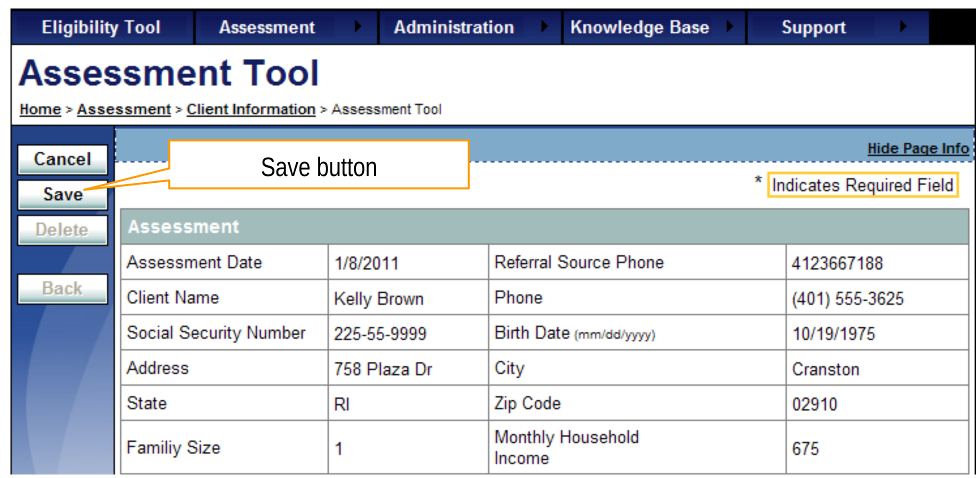
1. From the Client Information page, click the **Complete Online Assessment** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the Edit (**Edit**) button from the left toolbar.
3. The information that was entered for the Client profile will be displayed. Fill in the required fields and any optional fields you desire.
4. Click the Save (**Save**) button from the left toolbar.

   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
5. Click the Back (**Back**) button to return to the Listing page.



(Sample screenshot of the Assessment Tool Edit form)

Tips

- If *Other* is selected as a **Potential Pay Source for Services**, a new field will appear asking you to specify what that other pay source is.

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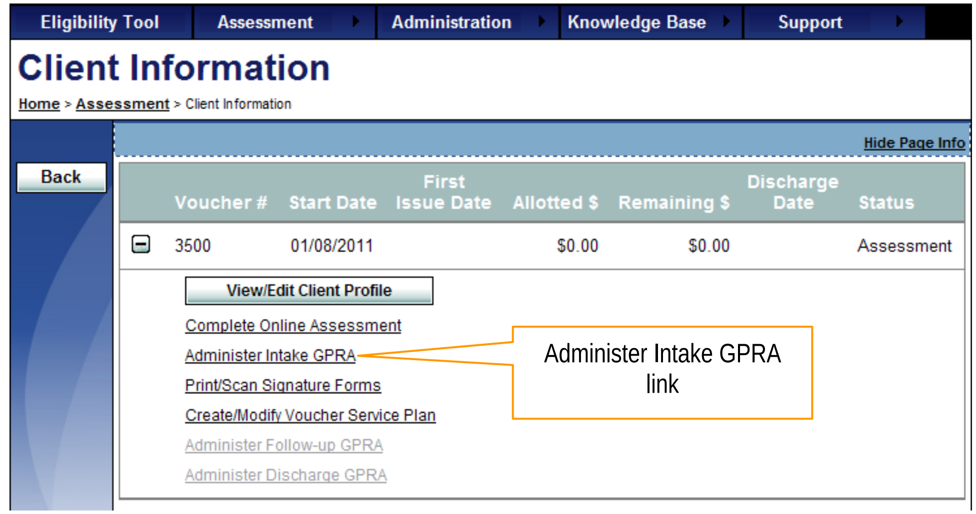
Administer Intake GPRA

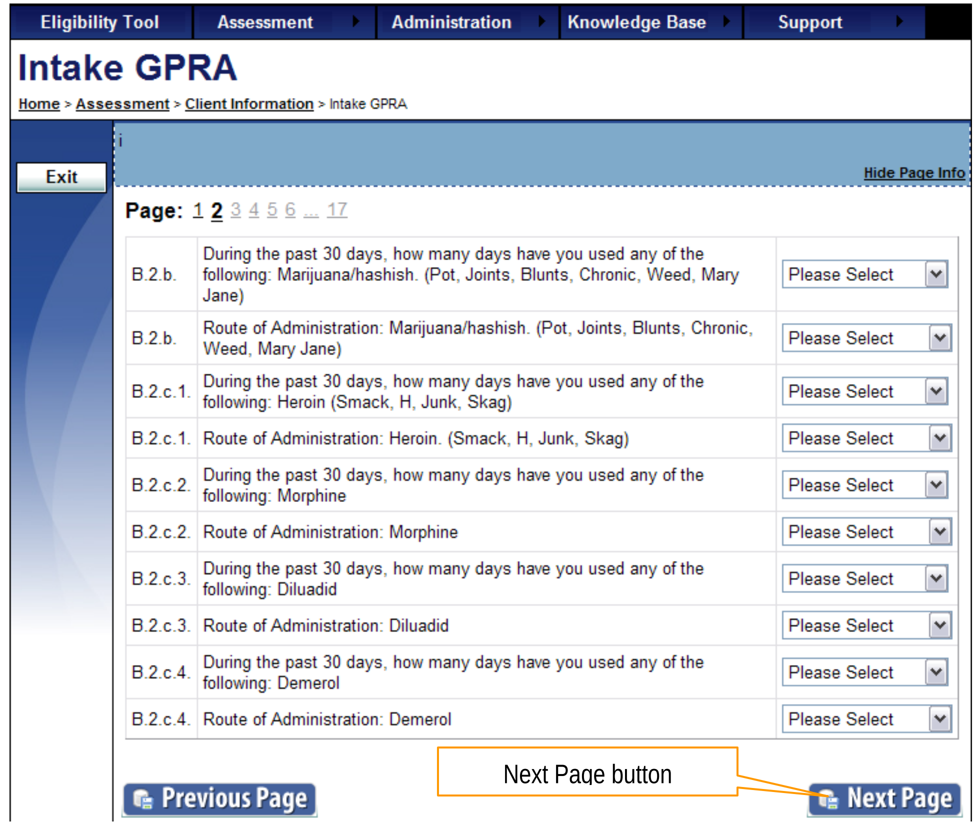
The Administer Intake GPRA is used to gather further information about a client.

1. From the Client Information page, click the **Administer Intake GPRA** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Answer questions using the drop down list to the right of the question.
3. Click the Next Page (Next Page) button to continue to the next page of questions or click the Previous Page (Previous Page) button to return to the previous page. (See table).
4. Continue in this manner until all the pages have been filled in.
5. Once you have answered all the questions, click the Finish (Finish) button.
6. Click the Exit (Exit) button to return to the Client Information Listing page.



(This is a screenshot of the Intake GPRA Survey.)

Below are the buttons that allow you to move within the GPRA Surveys.

Next Page	This button moves you to the page directly after the one currently on
Previous Page	This button moves you to the page directly prior to the one currently on.

Tip

- Clicking on the Next Page (Next Page) button will automatically save the current page.

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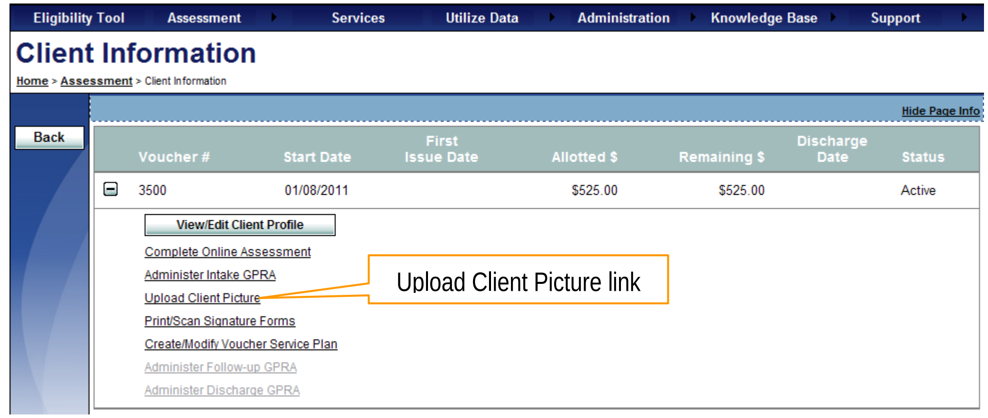
Upload Client Picture

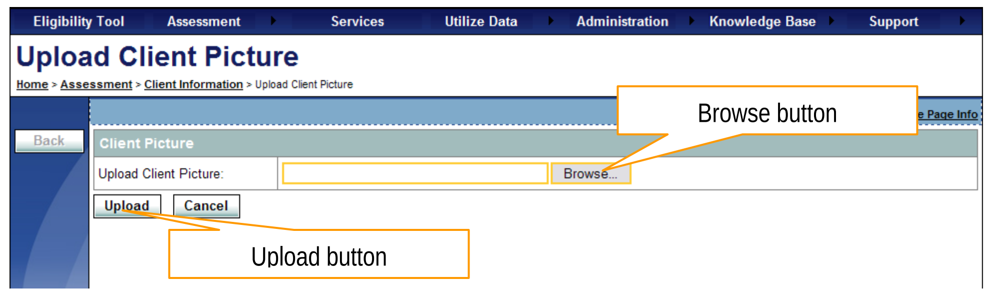
The Upload Client Picture module allows you to upload a picture of the client.

1. From the Client Information page, click the **Upload Client Picture** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the Add (**Add**) button from the left toolbar.
3. Click Browse... (**Browse**) button to browse your computer for the picture.
    a. After clicking the Browse... (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
4. Click the Upload (**Upload**) button.
5. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Upload Client Picture edit form.)

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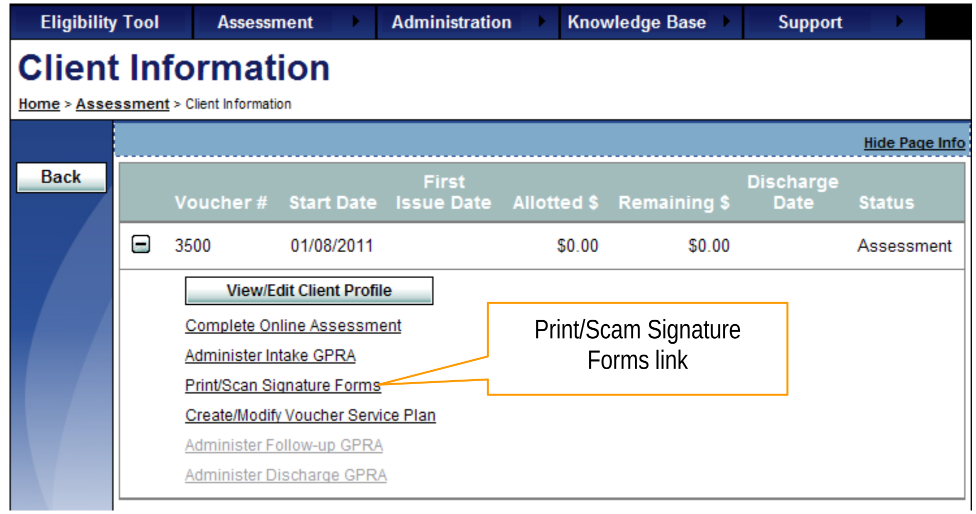
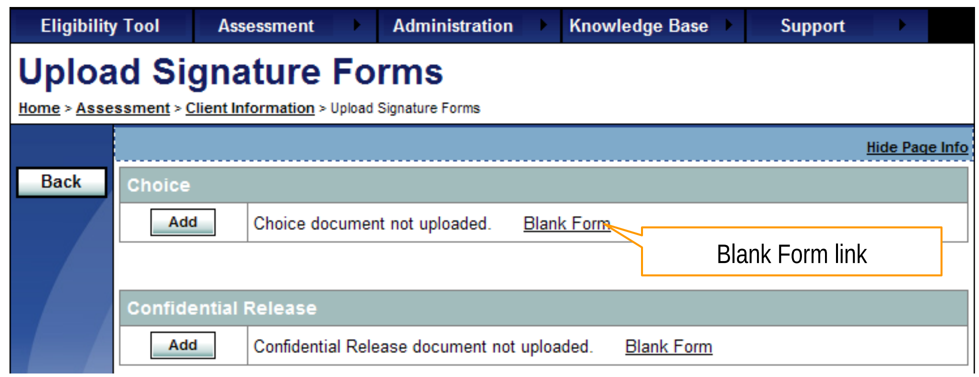
Print/Scan Signature Forms

The Print/Scan Signature Forms are the Choice and Confidential Release Forms which grant permission to client information.



(This is a sample screenshot of the Voucher Information Listing Page.)

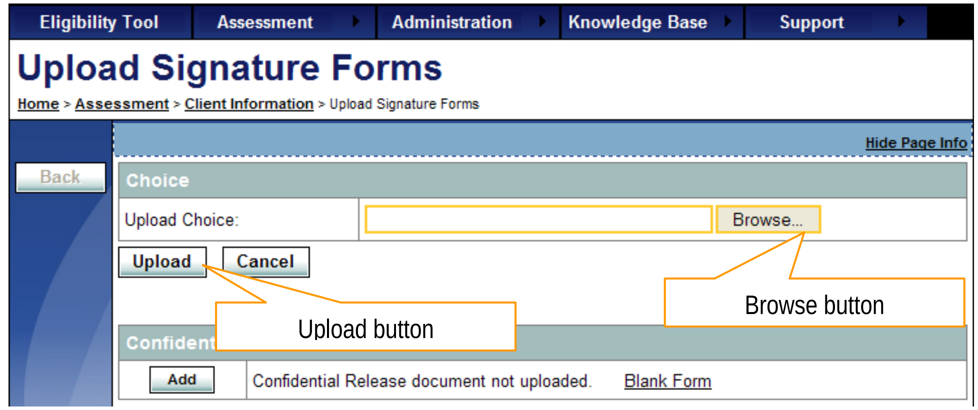
1. From the Client Information page, click the **Print/Scan Signature Forms** link.



(This is a screenshot of the Upload Signature Form Page.)

2. To download a Blank Form, click on the Blank Form link located to the right of the desired form.
3. A new window will open in a PDF File format.
    a. Click the (**Save**) button to save a copy to your computer. This must be done in order to use the digital signature.
    b. To digitally sign the form, click on the Sign (**Sign**) button in the Adobe Reader submenu.
    c. Click Place Signature... (**Place Signature**) and you will need to drag your mouse to draw the area where signature needs to appear.
    d. A new window will open and ask you to type in a password and to select the Appearance of the signature using radio buttons.
    e. Click the **Sign** button.
4. Once you have signed and dated the form in the designated areas, save the form.
5. To close the window, click the (X) in the upper right corner.

6. To upload the signed Form, click the (**Add**) button.
7. Click (**Browse**) button to browse your computer for the signed document.
    a. After clicking the (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
8. Click the (**Upload**) button.
9. Click the (**Back**) button to return to the Listing page.



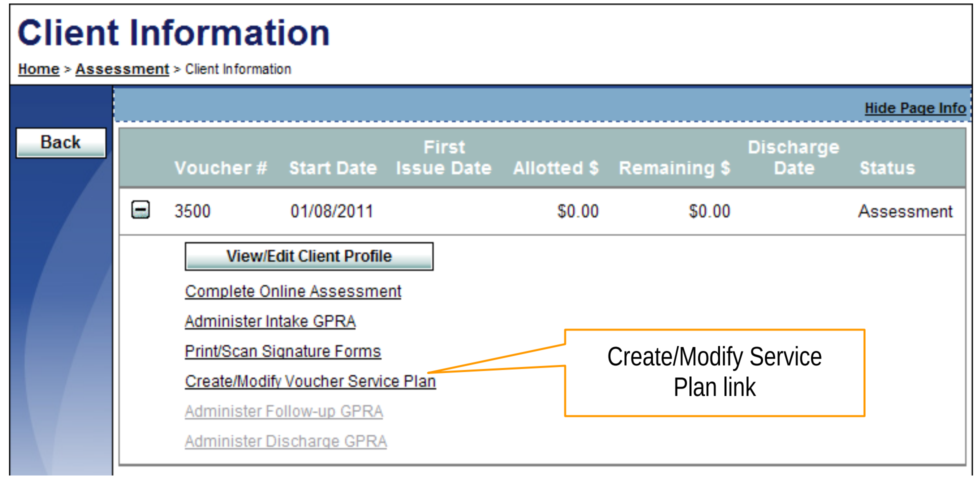
(This is a screenshot of the Upload Signature Form Page.)

Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

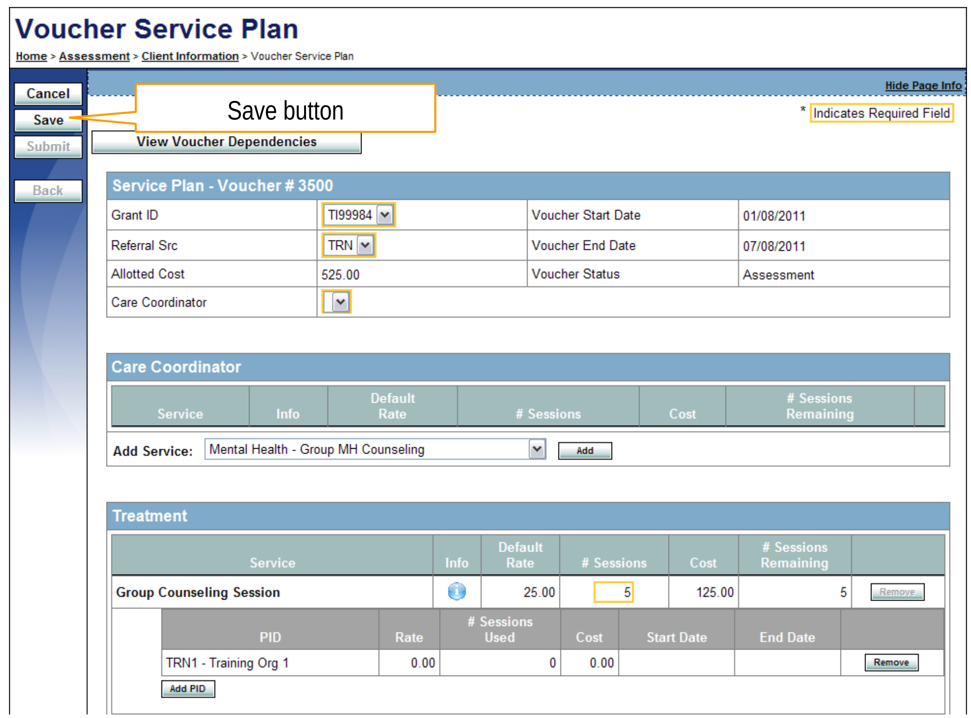
Create/Modify Voucher Service Plan

1. From the Client Information page, click the **Create/Modify Voucher Service Plan** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the Edit (**Edit**) button from the left toolbar.
3. Select the care coordinator for the client from the **Care Coordinator** dropdown list.
4. Select the services the client is to receive from the **Add Service** dropdown lists for each section that is relevant to the client.
   a. Click the Add (**Add**) button.
5. Enter in the number of sessions the client is planned to receive in the **# Sessions** field.
6. Click the Add PID (**Add PID**) button.
   a. A new window will open displaying the program location information. Click the Select (**Select**) button to the left of the provider that will be providing the service.
   b. Click the Add to Plan (**Add to Plan**) button.
7. If you wish to add any notes or comments to the Service Plan, click the Add (**Add**) button in the Comments section.



(This is a partial screenshot of the Voucher Service Plan Page.)

a. The **Comment Type** will be defaulted to *Provider*.

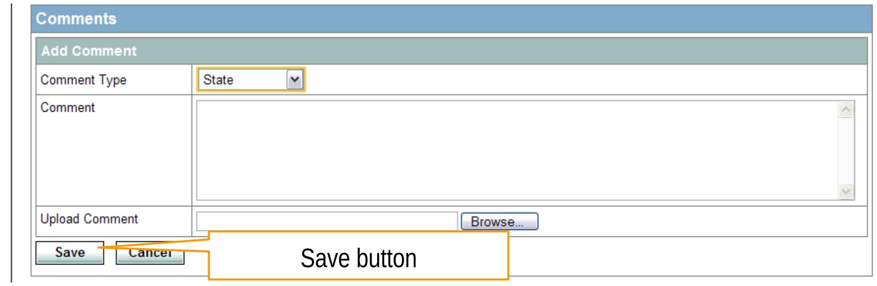
b. Enter a brief description of your note or comment in the **Comment** field.

c. If you would like to upload a document pertinent to the client's service plan, click the (**Browse**) button.

   i. After clicking the (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.

d. Click the (**Save**) button.

   *Note: To cancel the comment, click the (**Cancel**) button.



(This is a partial screenshot of the Voucher Service Plan Page.)

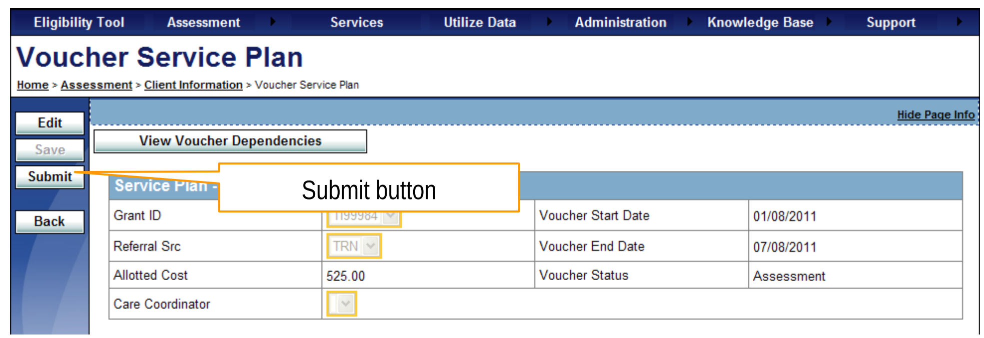
8. Click the (**Save**) button from the left toolbar.

   *Note: To exit the screen without saving any changes, click the (**Cancel**) button.

9. If you are ready to submit the Service Plan for review, click the (**Submit**) button.

10. Click the (**OK**) button. If there are errors you will need to click the (**View Voucher Dependencies**) button.

11. Click the (**Back**) button to return to the Listing page.



(This is a partial screenshot of the Voucher Service Plan Page.)

Tips

- If a client has been inactive for 6 months after the First Issue date (no services have been entered) then their status on the Client Registration page will be updated to Inactive. If an attempt is made to edit the status then they will receive the following message: "This client has been inactive for 6 or more months; therefore funded ATR services can no longer be received."
- Once a service plan has been submitted, an email will be triggered to the Care Coordinator informing him/her of the services associated with the client.

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View Voucher Dependencies

The **View Voucher Dependencies** is a validation tool used within the application to ensure that all the required parts are fulfilled when entering a client's information into the **Service Plan**. You are able to save the **Service Plan** if there are validation errors, but you will not be able to submit the **Service Plan** if there are errors.

1. If your **Service Plan** has errors, when you click the Submit (**Submit**) button you will receive an error message.
2. The View Voucher Dependencies (**View Voucher Dependencies**) button enforces validation errors when creating the **Service Plan**.
3. A new window will open displaying the various parts entered into the **Service Plan**.
4. To close the new website window, click on the ☒ (X) in the upper right hand corner.
5. Once you have corrected the errors, you will be able to submit the Service Plan.

GPRA Survey **Complete, With Errors**

GPRA Survey Errors

- Page 1: B1b1 + B1b2 cannot be greater than B1a.
- Page 1: B1b2 cannot exceed B1a.
- Page 1: If B1a + B1c <= 30, then B1d cannot exceed the minimum poitive value of B1a and B1c.
- Page 1: B2a cannot exceed B1c.
- Page 1: If the first part of B2a is greater than zero, then the second part of B2a can not be -1.

Photo **Complete**

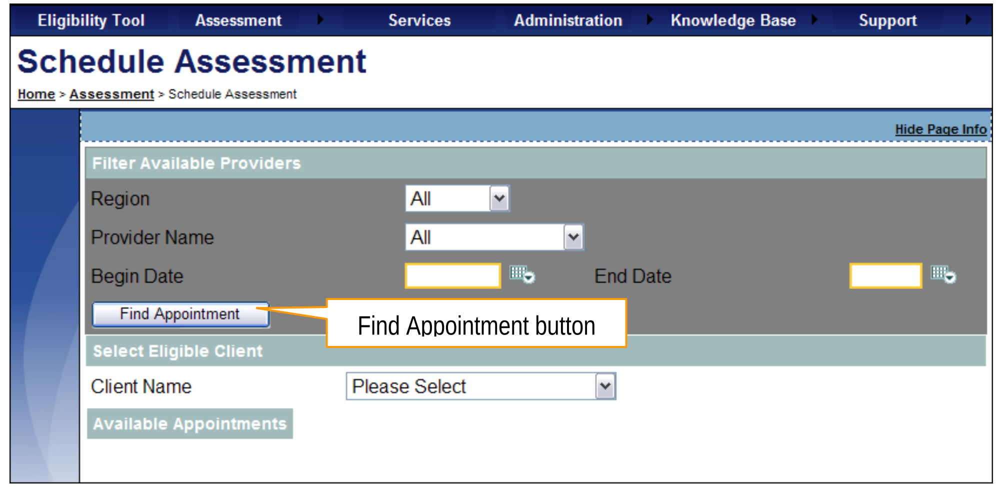
File: wtfareyoulookingat.bmp
File Path: Download\Train_2008050216214466_P_wtfareyoulookingat.bmp

(This is a sample screenshot of the Voucher Dependencies form.)

Schedule Assessment

The Schedule Assessment module allows you to schedule an assessment with a client based on your availability. You must enter your availability using the Scheduler in the Administration module first.

1. Click **Assessment** from the Menu.
2. Click **Schedule Assessment** from the Assessment Landing page.
3. Select the region of the provider from the **Region** dropdown list. This is defaulted to display *All* regions.
4. Select the provider from the Provider Name dropdown list. This is defaulted to display *All* provider names.
5. Enter a date the assessment will begin in the **Begin Date** field or select the date by clicking on the calendar. (See Calendar section for further details).
6. Enter a date the assessment will end in the **End Date** field or select the date by clicking on the calendar. (See Calendar section for further details).
7. Select the client from the **Client Name** dropdown list.
8. Click the Find Appointment (**Find Appointment**) button.



(This is a screenshot of the Schedule Assessment form.)

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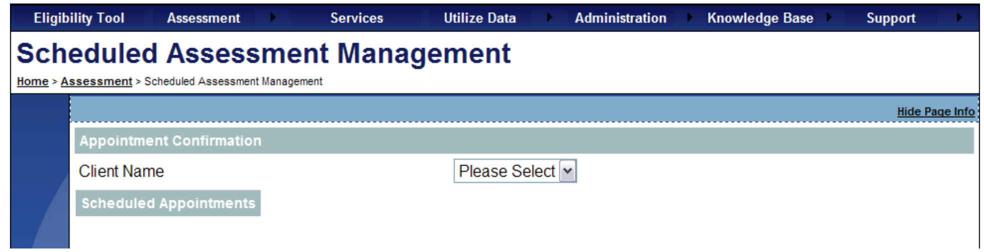
Scheduled Assessment Management

The Scheduled Assessment Management module allows you to view your scheduled appointments.

1. Click **Assessment** from the Menu.
2. Click **Schedule Assessment** from the Assessment Landing page.
3. Select the client from the **Client Name** dropdown list.



(This is a screenshot of the Schedule Assessment Management form.)

Tips

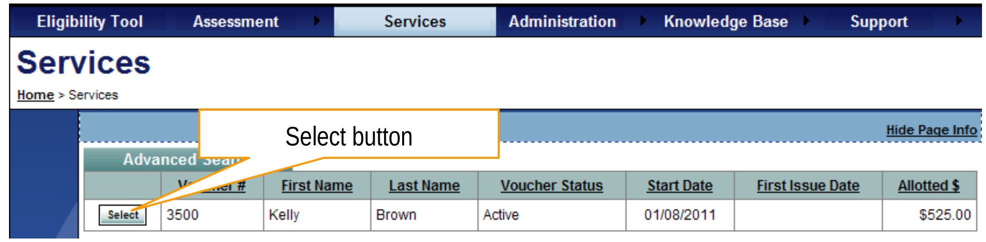
- If the Client dropdown list is empty, nothing has been scheduled for the staff member currently logged in.

SERVICES

The Services module is designed to track the voucher treatment and recovery support service transactions within the application.

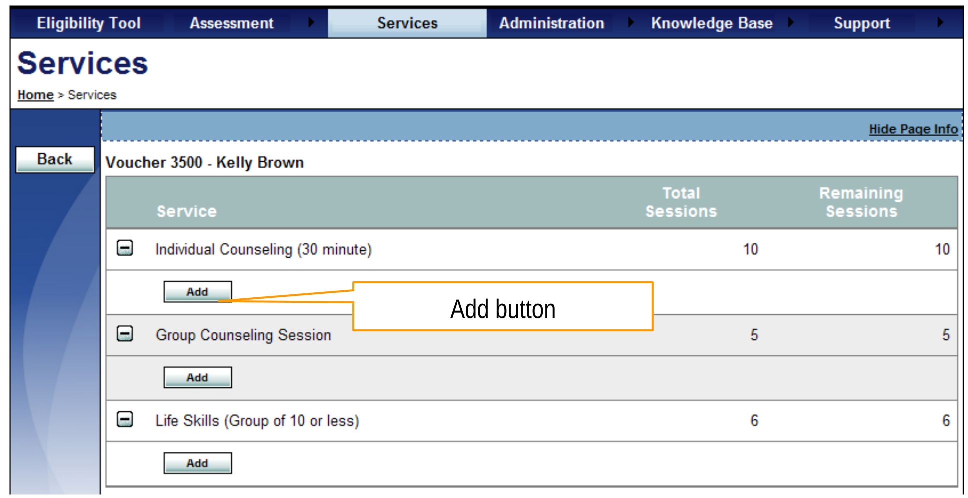
Add a Service Record

1. Click **Services** from the Menu.
2. From the Listing Page, select the client you wish to enter service information for by clicking the (**Select**) button to the left of the Voucher ID.



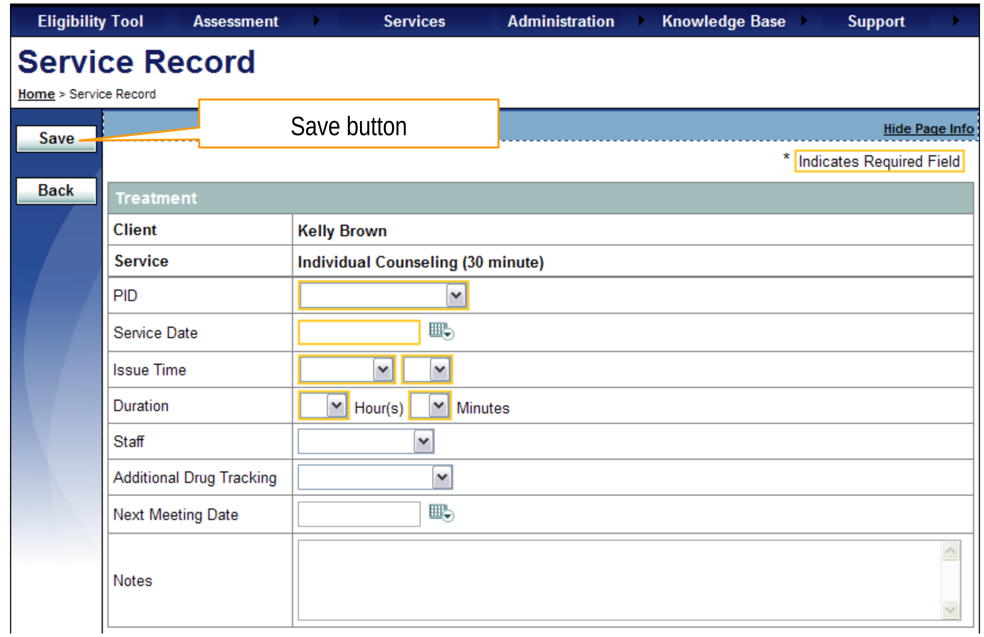
(This is a sample screenshot of the Services Listing Page.)

3. Click the (**plus sign**) to the left of the appropriate service. The (**plus sign**) will become a (**minus sign**). To close the description, click on the (**minus sign**).
4. To add session information, click the (**Add**) button.



(This is a sample screenshot of the Services Page.)

5. Fill in the required fields and any optional fields you desire.
6. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Individual Counseling Service Page.)

Tips

- Services are entered at the State Level into the Service Plan for each client. The clients that have your organization selected as the Service Provider will display when you enter in the various tabs within the application.
- The duration field is a required field based on the billing type of service.

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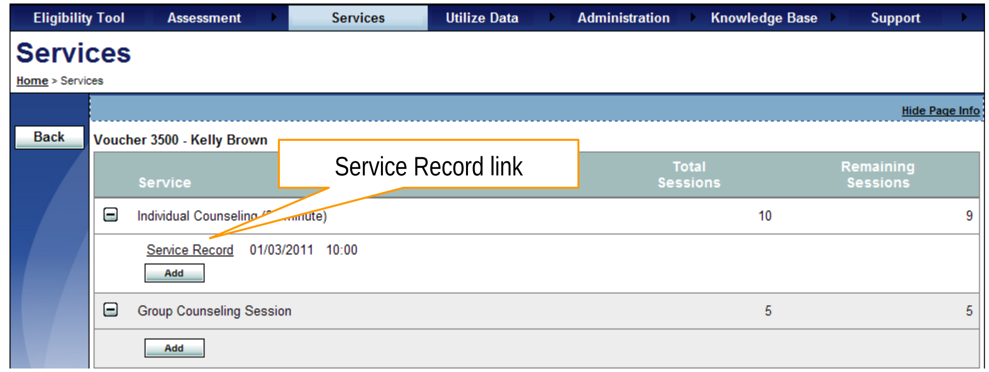
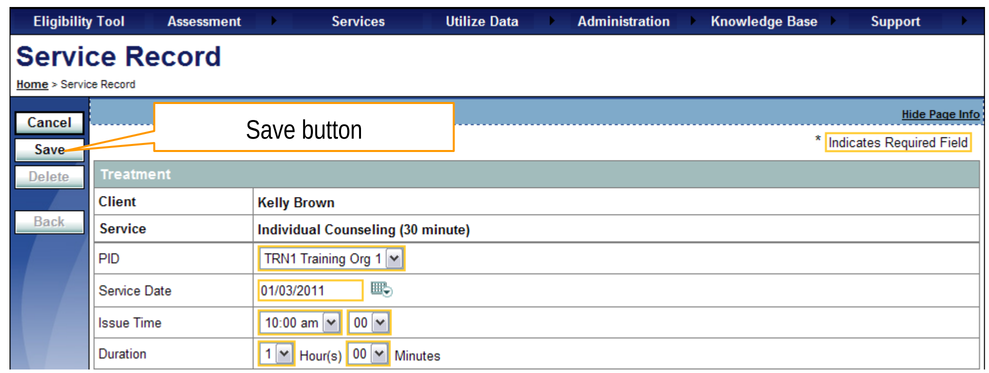
Editing a Service Record

1. From the Services Listing page, click the Select (**Select**) button next to the voucher that has the service that needs updated.
2. From the Services Page, click the ⊞ (**plus sign**) next to the service type that needs edited.
3. Select the Service Record you wish to edit by clicking on the appropriate <u>Service Record</u> link.



(This is a sample screenshot of the Services Page.)

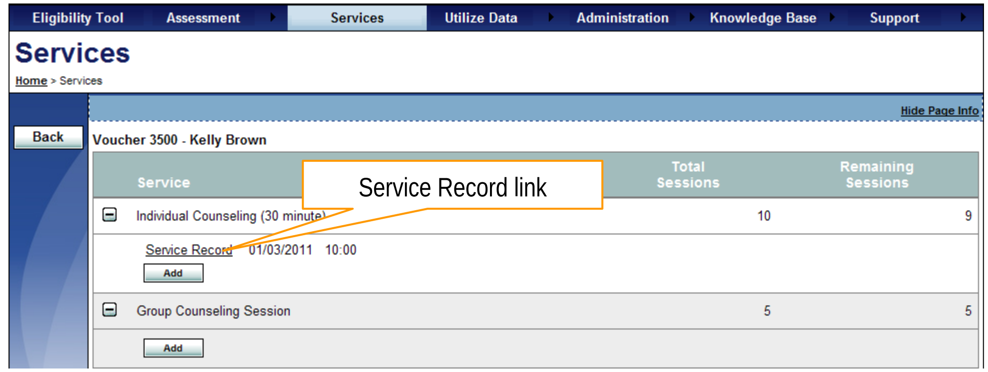
4. Click the Edit (**Edit**) button from the left toolbar.
5. The Service Record will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Individual Counseling Service Page.)

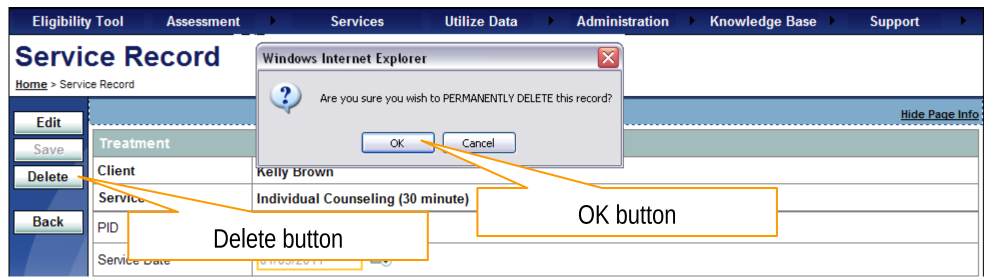
Deleting a Service Record

1. From the Services Listing page, click the Select (**Select**) button next to the voucher that has the service that needs deleted.
2. From the Services Page, click the ⊞ (**plus sign**) next to the service type that needs deleted.
3. Select the Service Record you wish to delete by clicking on the appropriate <u>Service Record</u> link.



(This is a sample screenshot of the Services Page.)

4. The Service Record will appear in the edit mode.
6. Click the Delete (**Delete**) button from the left toolbar.
7. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the client.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.



(This is a sample screenshot of the Individual Counseling Service Page.)

Tips

- Services can be deleted if the service has <u>not</u> been fiscally approved. If the service <u>has been</u> fiscally approved then the service can only be deleted up to 14 days after the fiscal approval date.

UTILIZE DATA

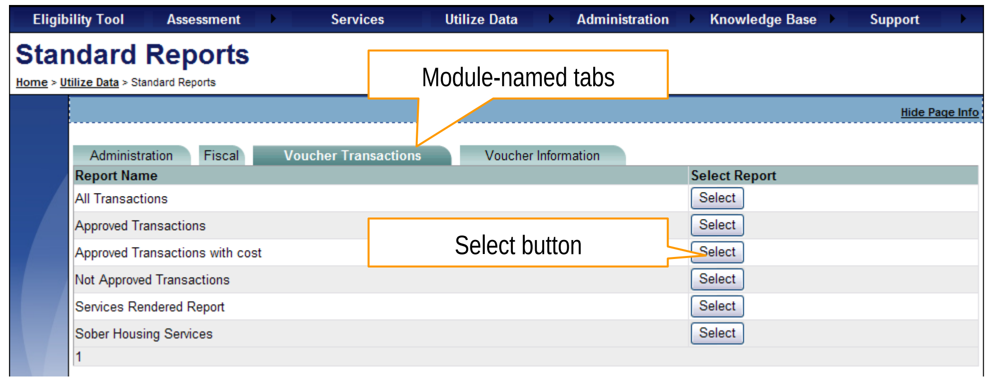
The Utilize Data module is designed to generate reports to assist with tracking, monitoring and assessing voucher information.

Standard Reports

The Standard Reports module enables you to have the ability to get specific voucher, fiscal and administration information through reports.

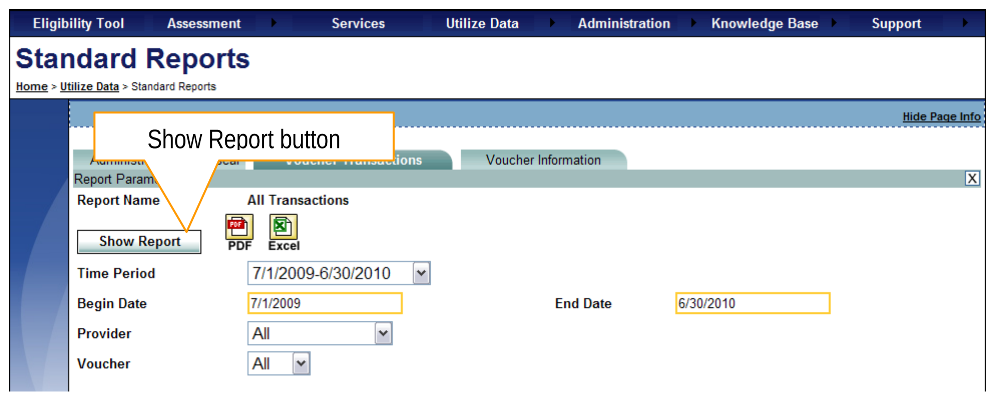
Selecting a Standard Report

1. Click **Utilize Data** from the Menu.
2. Click **Standard Reports** from the Utilize Data Landing Page.
3. Select the type of report you wish to view/print from the module-named tabs (i.e. Administration, Voucher Transactions, etc.)
4. Select the report you wish to view/print by clicking the Select (**Select**) button.



(This is a screenshot of the Standard Reports Page.)

5. Select any filtering parameters, if applicable.
6. Click the Show Report (**Show Report**) button.
7. A new window will open. To close the new window, click on the (X) in the upper right corner.
8. Click on the (X) in the upper right corner to return to the list of reports or click the module-named tab.



(This is a screenshot of the Standard Reports Page.)

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Tips

- The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on the link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html if you are unable to download Active X, contact your organization's IT department.
- If you have a pop-up blocker on your computer, hold the ctrl key on your keyboard down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

ADMINISTRATION

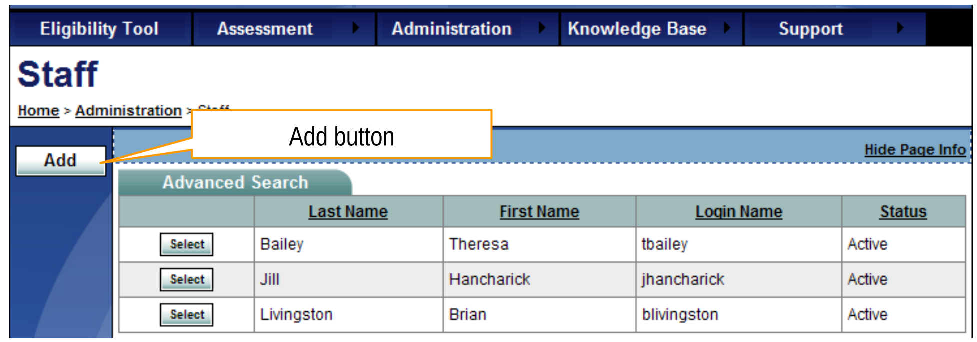
The Administration module is designed to complete administrative tasks within the application, such as updating organization information, staff registration, and changing a password.

Staff

The Staff module is used to register any staff members that should have access to the data entered within the application.

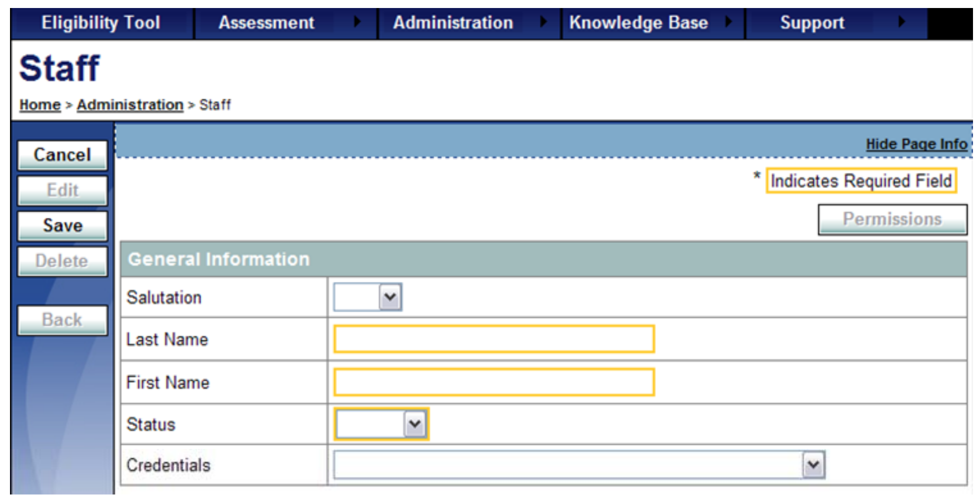
Adding a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Click the Add (**Add**) button.



(This is a sample screenshot of the Staff Listing Page.)

4. Enter the staff member's **General Information.**
   a. Select the staff member's salutation from the **Salutation** dropdown list. This is an optional field.
   b. Enter the staff member's first name in the **First Name** field.
   c. Enter the staff member's last name in the **Last Name** field.
   d. The **Status** is defaulted to *Active*.
      i. *Active*: the staff member is currently with your organization (can be viewed on other screens and reports).
      ii. *Inactive*: the staff member is no longer with your organization (will no longer appear on other screens and reports).
   e. Select the staff member's credential from the **Credentials** dropdown list. This is an optional field.



(This is a partial screenshot of the Manage Staff Profile General Information fields.)

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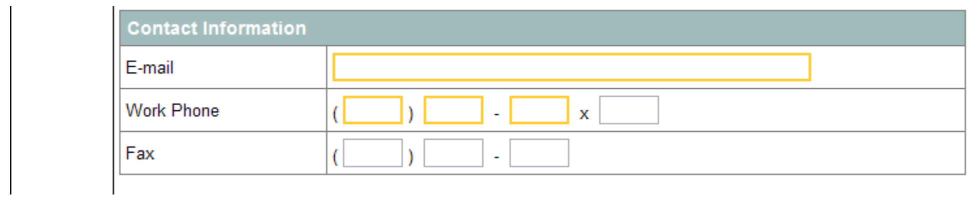
5. Enter the staff member's **Login Information**.
   a. Enter a **Login Name** for the staff member. This will be the User ID used by the staff member upon login.
   b. A **Password*** will need to be set up by the staff member. Click on reset password. The staff member should receive an email to activate the account. See the [Account Activation](#)- page 22 section for additional information.

(This is a screenshot displaying the Staff Login Information fields.)

6. Enter the staff member's **Contact Information**.
   a. Enter the staff member's email address in the **E-mail** field.
   b. Enter the staff member's work telephone number in the **Work Phone** field.
      *Note: The Work Phone must be filled out in three fields. The fourth field is optional for an extension number.
   c. Enter the staff member's fax number in the **Fax** field. This is an optional field.



(This is a screenshot displaying the Staff Contact Information fields.)

7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

Tips

- Setting the **Status*** to *Inactive* is used to keep the staff members in the database for history purposes but removed from all of the staff lists on the forms. When a staff member leaves your organization you will not be able to delete the staff member, but you can change the **Status*** to *Inactive* to remove their name from forms and prevent the staff member from entering the application.
- If the email address is updated on the staff account, the staff member will need to re-activate their account.

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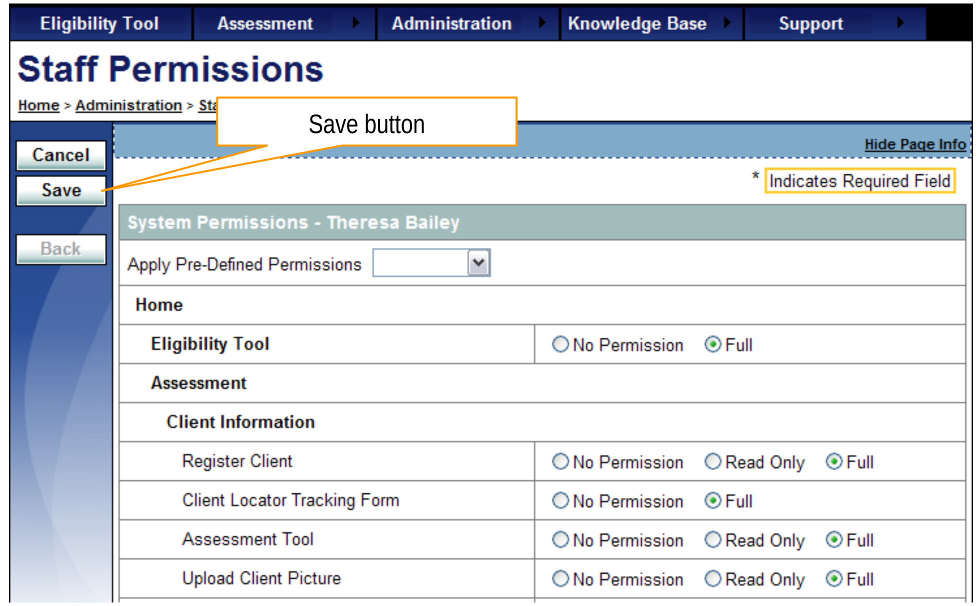
Permissions

The Staff Permissions module allows a user to assign permissions to access the forms within RI ATR.



(This is a sample screenshot of the Staff Permissions Edit form)

1. From the Staff Edit form, click the Permissions (**Permissions**) button.
2. Click the Edit (**Edit**) button from the left toolbar.
3. Select a permission role from the **Apply Pre-Defined Permissions** dropdown list. See the Apply Pre-Defined Permissions section for additional information.
4. If you wish to modify the pre-defined permissions, select the radio button next to the appropriate permission level for each module.
   a. *No Permission*: staff member has no access to the module
   b. *Read Only*: staff member is able to view the data only
   c. *Full*: staff member is able to view, add, edit, and delete the data
5. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
6. Click the Back (**Back**) button to return to the Staff edit form.

Tips

- When changing permissions, the account must log out for the change in the permission level to take place.

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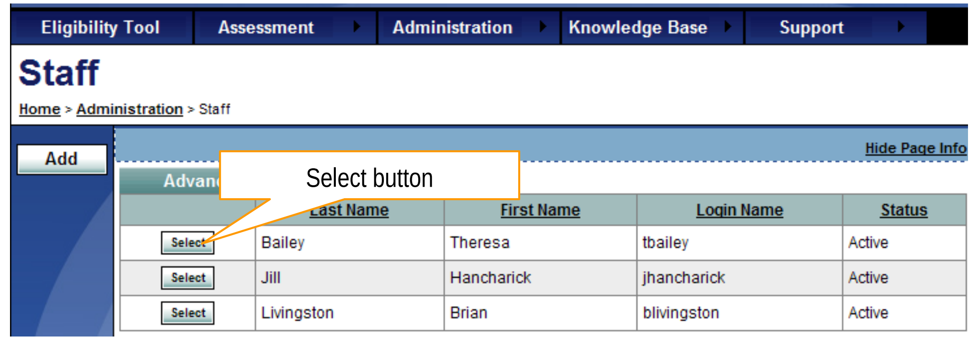
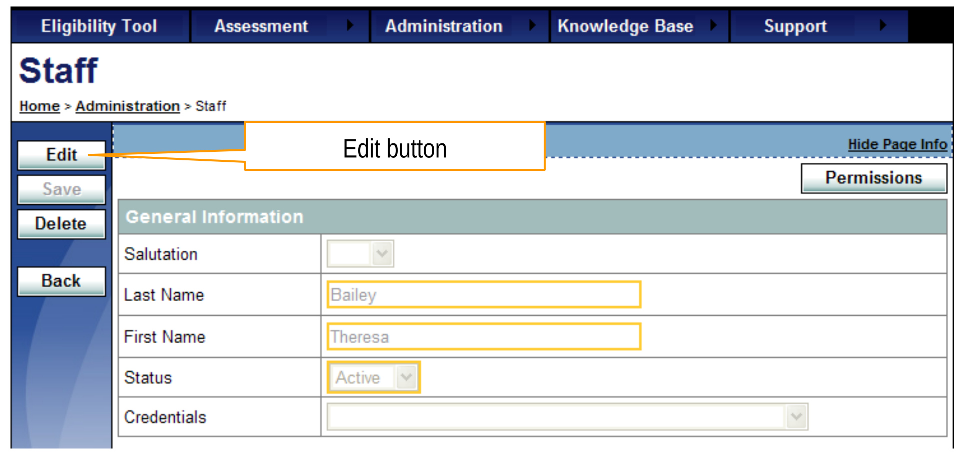
Editing a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to edit by clicking the (**Select**) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

4. Click the (**Edit**) button from the left toolbar.
5. The staff member will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the (Cancel) button.
8. Click the (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Staff Edit Form.)

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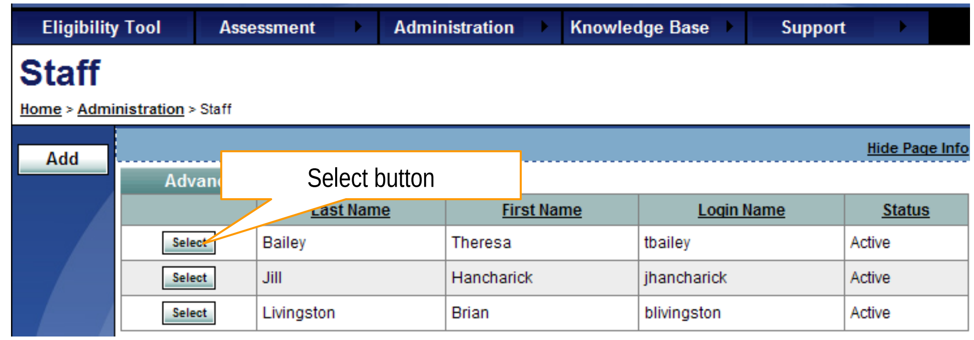
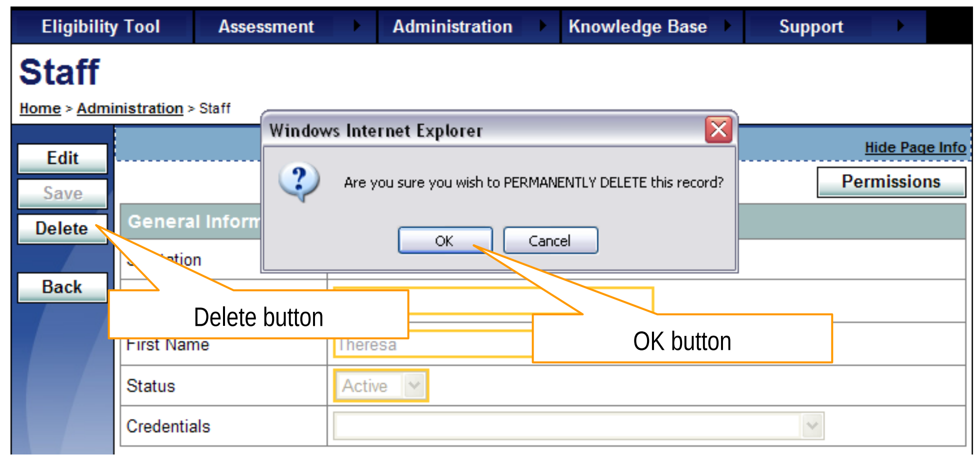
Deleting a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to delete by clicking the (**Select**) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

4. Click the (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the (**OK**) button to continue deleting the staff member.
   *Note: To cancel the deletion, click the (Cancel) button.



(This is a sample screenshot of the Staff Page Edit Form.)

Tips

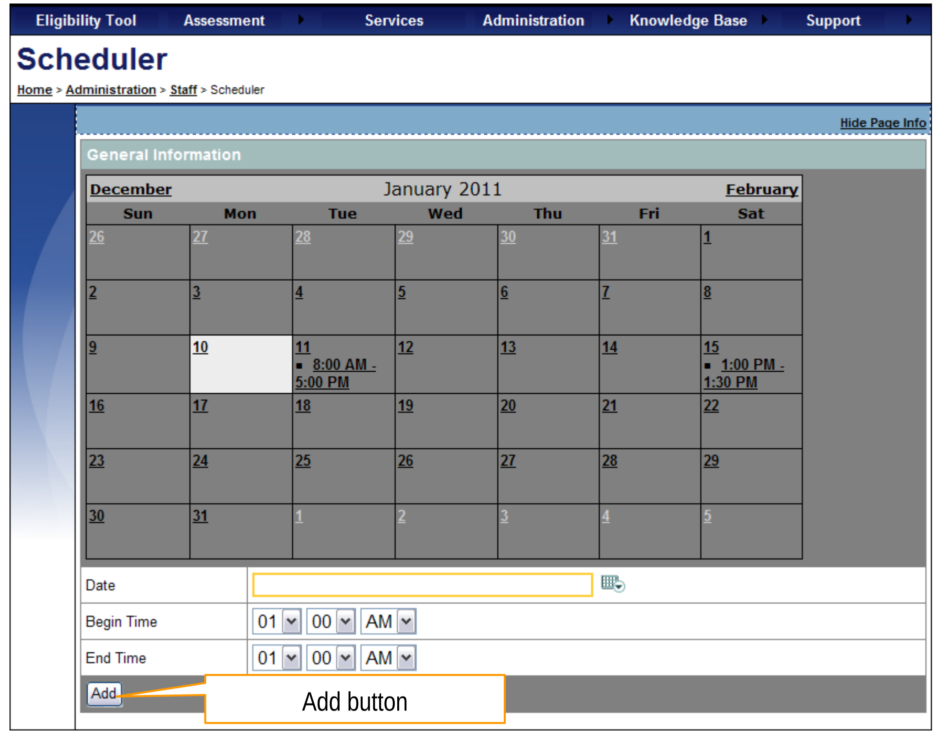
- You will not be able to delete a staff member if it is associated with any other details. In this instance, set the **Status*** of the staff member to *Inactive*.

Scheduler

The Scheduler is available to allow staff to enter their availability for scheduling assessment meetings with clients.

Adding Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Enter the date the staff member has available time in the **Date** field or select the date by clicking on the calendar. (See Calendar section for further details).
4. Select a begin time from the Begin Time dropdown lists.
5. Select an end time from the End Time dropdown list.
6. Click the Add (**Add**) button.
7. The available time slot will appear on the calendar.



(This is a sample screenshot of the Scheduler Edit form.)

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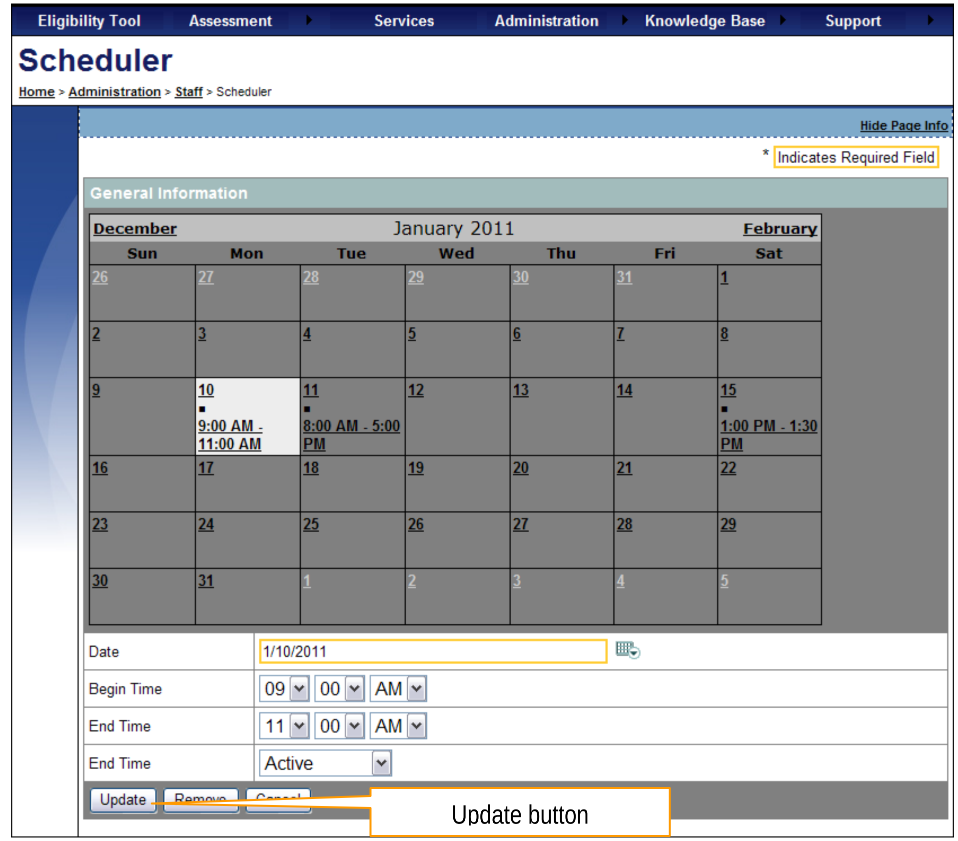
Edit Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Select the time slot from the calendar.
4. Make any changes to the details.
5. Click the Update (**Update**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
6. The available time slot will appear on the calendar.



(This is a sample screenshot of the Scheduler Edit form.)

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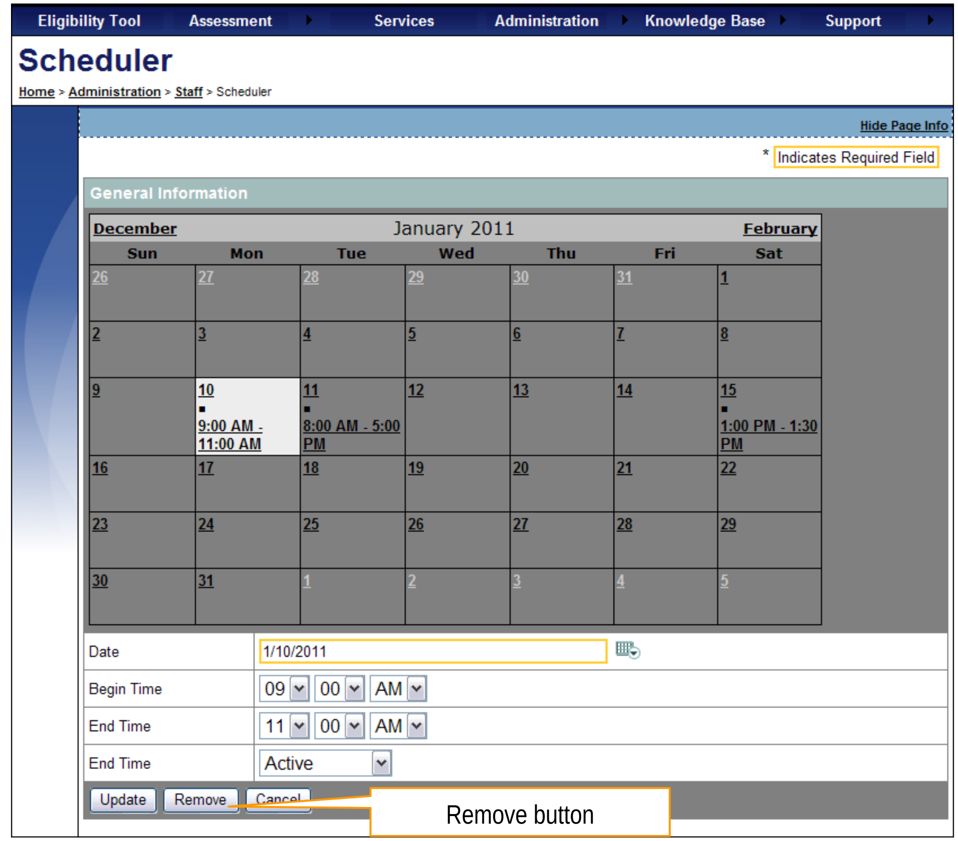
Delete Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Select the time slot from the calendar.
4. Click the Remove (**Remove**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.

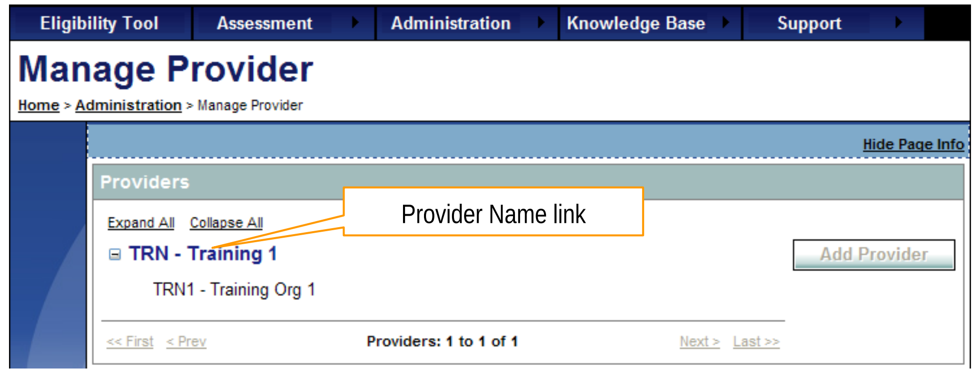


(This is a sample screenshot of the Scheduler Edit form.)

Manage Provider

The Manager Provider module allows the user to add and edit locations and contact and service information for providers and PIDs. This information only needs to be updated on an as-needed basis.

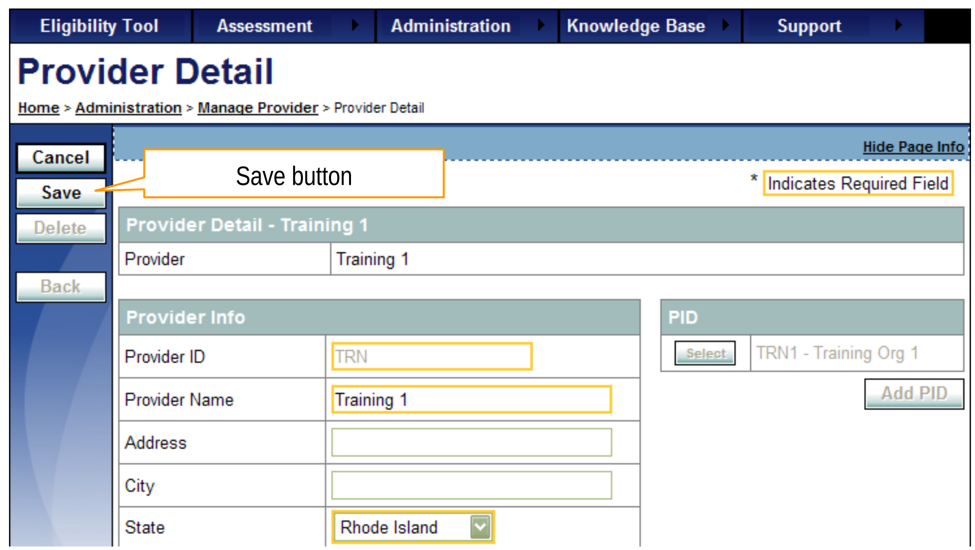
*Note: The staff member with the admin permission level is the only person capable of editing this screen within each organization.



(This is a sample screenshot of the Manage Provider Listing Page.)

Viewing and Editing Provider Details

1. Click **Administration** from the Menu.
2. Click **Manage Provider** from the Administration Landing Page.
3. Click the **Provider Name** link.



(This is a sample screenshot of the Provider Detail Edit form)

4. Click the Edit (**Edit**) button from the left toolbar.
5. Edit the Provider Info to include your organization's information.
6. Select a staff member to serve as the primary contact for your organization from the Staff dropdown list.
   *Note: The email, work phone, and fax will populate with information added from the Staff module.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

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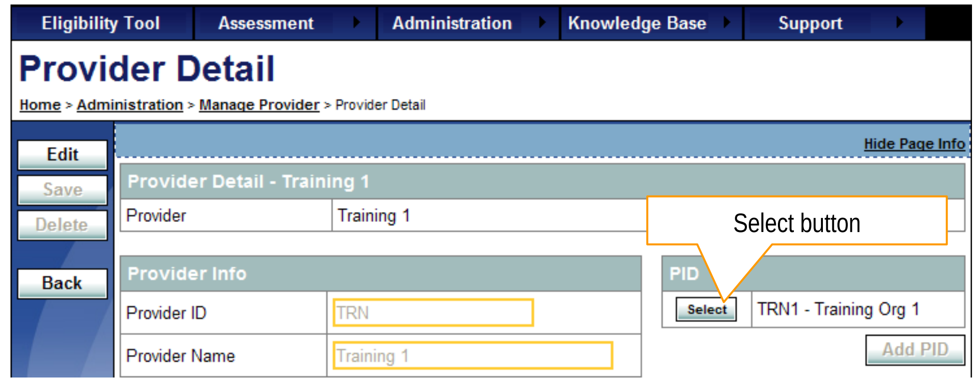
Tips

- Only the state can change the Provider ID and Provider Name information. If any information is incorrect for your organization, submit a request through the online support site Contact Support link or contact the state.



(Access Way 1: Sample screenshot displaying the Provider Detail edit form)

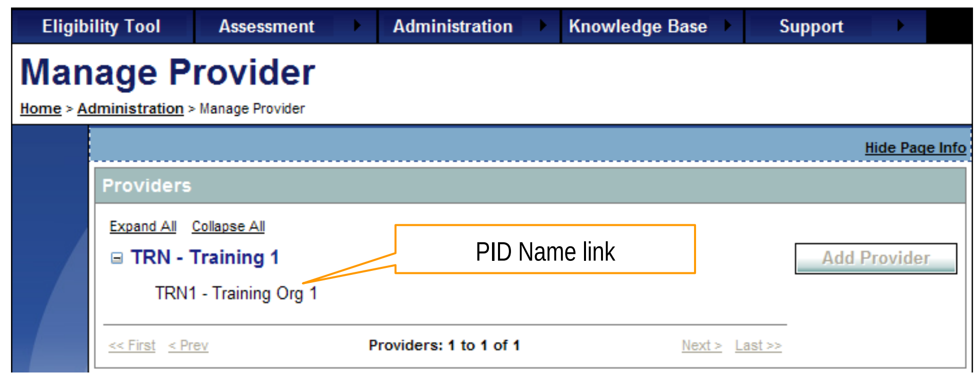
Viewing and Editing PID Details

The PID Info can be accessed in two (2) ways:

1. From the Provider Details page, click the Select (**Select**) button from the PIDs grid.

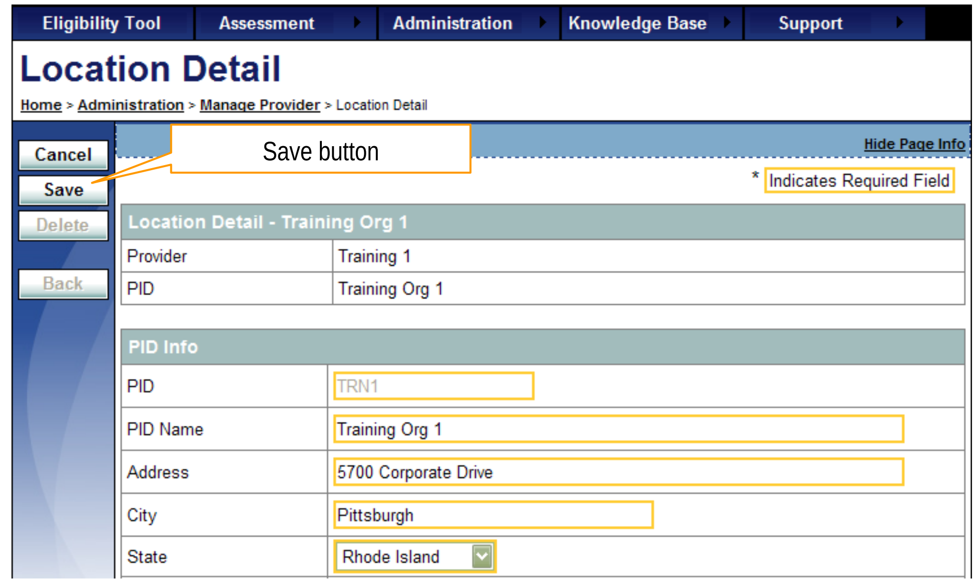
   or

1. Click **Administration** from the Menu.
2. Click **Manage Provider** from the Administration Landing Page.
3. Click the **Provider Name** link to display the PIDs associated with it.
4. Click the **PID Name** link.



(Access Way 2: Sample screenshot displaying the Manage Provider Listing page)

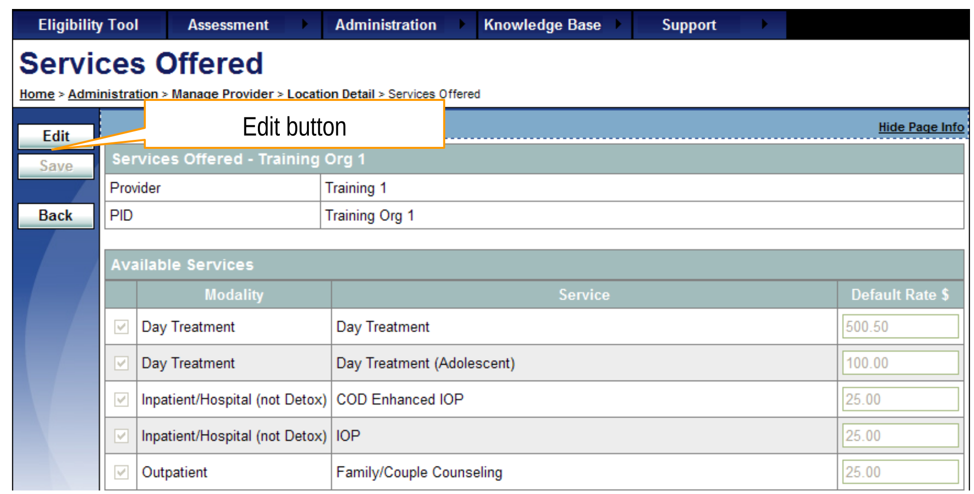
1. Click the Edit (Edit) button from the left toolbar.
2. Edit the PID Info to include your location's information.
3. Select a staff member to serve as the primary contact for your location from the Staff dropdown list.
   *Note: The email, work phone, and fax will populate with information added from the Staff module.
4. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
5. Click the Back (Back) button to return to the Listing page.



(Sample screenshot displaying the Location Detail edit form)

Services Offered

1. From the Location Details edit form, click the Services Offered (Services Offered) button.
2. Click the Edit (Edit) button from the left toolbar.
3. Select the checkboxes to indicate the services you provide. Uncheck the checkboxes for services that your Organization does not provide.
4. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
5. Click the Back (Back) button to return to the Listing page.

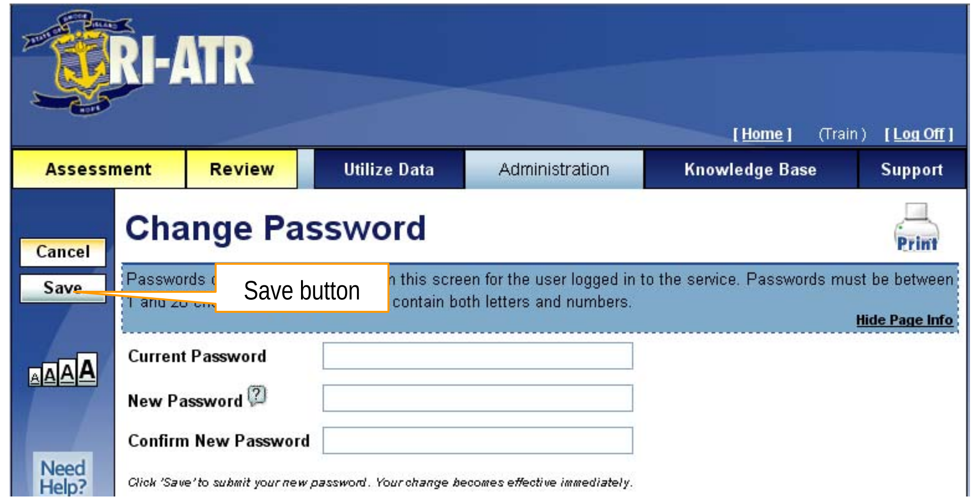


(This is a sample screenshot of the Services Provided page.)

Change Password

The Change Password module allows the user to change the password on the account they are currently logged into.

1. Click **Administration** from the Menu.
2. Click **Change Password** from the Administration Landing Page.
3. Enter the current password for the account in the **Current Password** field.
4. Enter a password you would like to use in the **New Password** field.
5. Re-type the new password in the **Confirm New Password** field.
6. Click the Change (**Change**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. You will receive a confirmation message indicating the password was changed successfully. Click OK (**OK**) to continue.



(This is a screenshot of the Change Password Page.)

Tips

- It is important to remember that passwords are case sensitive.
- Passwords must have a minimum 8 characters in length, have 1 upper case character, have 1 number, and cannot use User ID as part of password.
- You will be prompted to change your password every 90 days.

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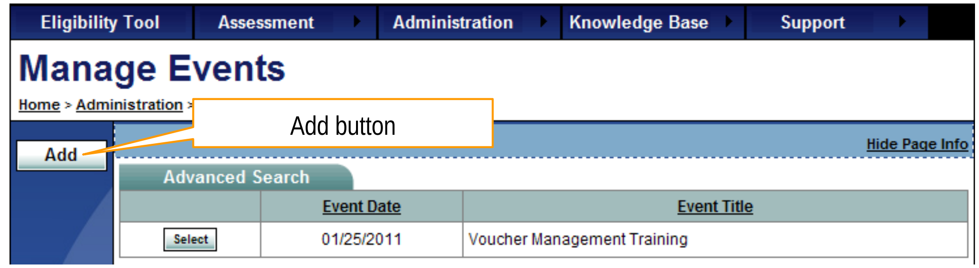
Manage Events

The Manage Events module is designed to add, edit or delete events in the Events Calendar. Events added at provider level will only be viewed by that provider.

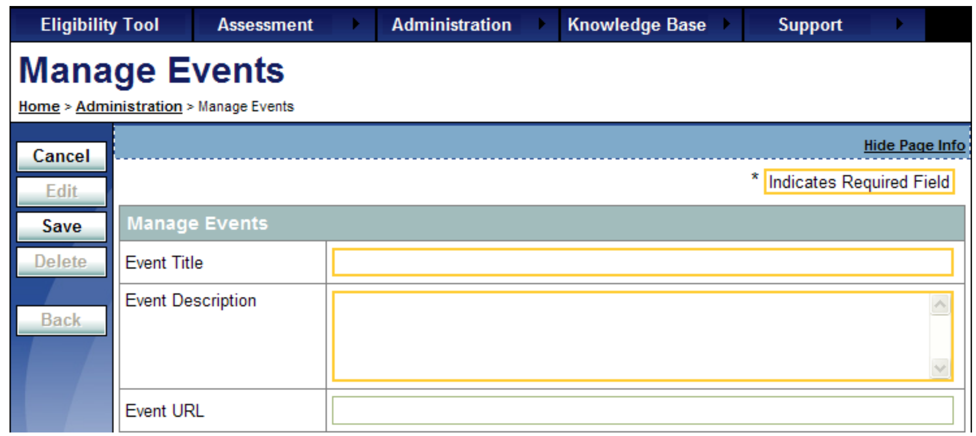
Adding an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Click the Add (**Add**) button from the left toolbar.



(This is a sample screenshot of the Manage Events Listing Page.)

4. Enter a brief description of the event in the **Event Title** field.
5. Enter the description of the event in the **Event Description** field.
6. If there is a website associated with the event, enter the website address in the **Event URL** field.



(This is a partial screenshot of the Manage Events edit form)

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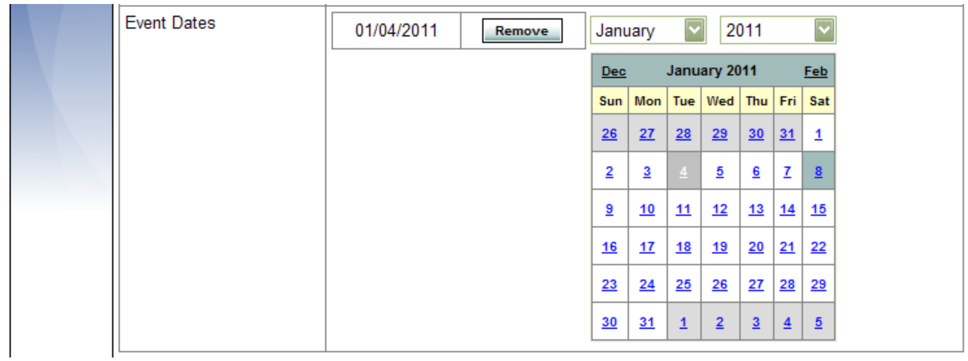
7. Select the date(s) the event will take place using the Event Dates calendar. You may select multiple dates.
    a. Select the month the event will take place from the first dropdown list. This is defaulted to the current month.
    b. Select the year the event will take place from the second dropdown list. This is defaulted to the current year.
    c. Select the days the event will take place using the calendar.
        i. To remove a selected date, click the (**Remove**) button to the right of the date.

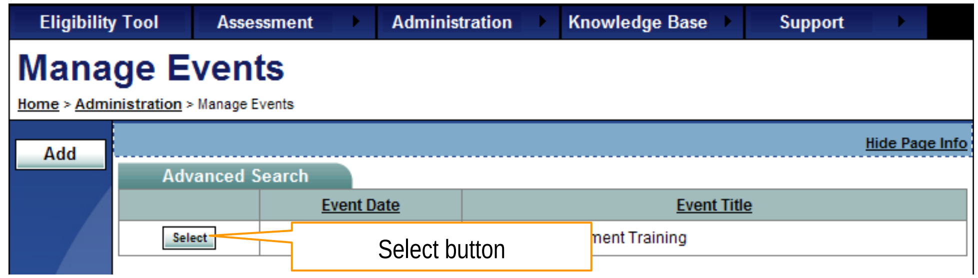
12. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
13. Click the Back (**Back**) button to return to the Listing page.



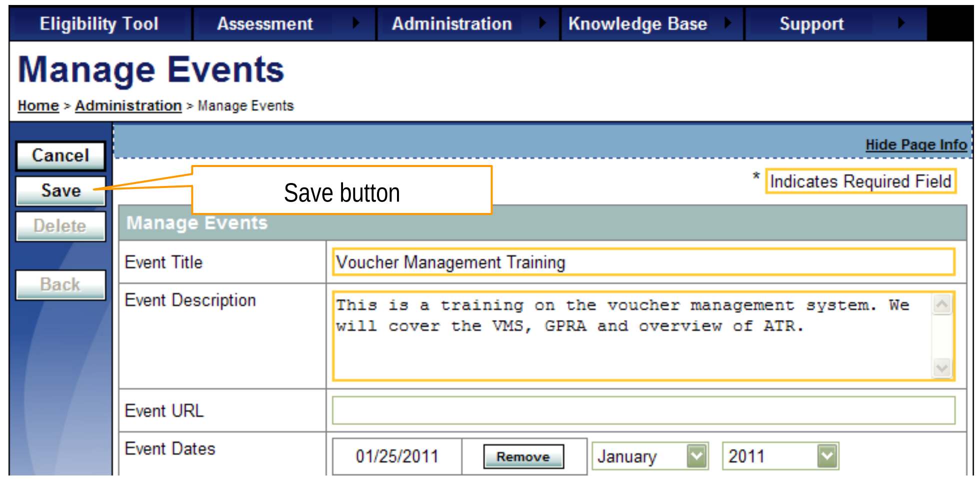
(This is a partial screenshot of the Manage Events edit form)

Editing an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to edit by clicking the Select (**Select**) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)



(This is a partial screenshot of the Manage Events edit form)

4. Click the Edit (**Edit**) button from the left toolbar.
5. The event will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

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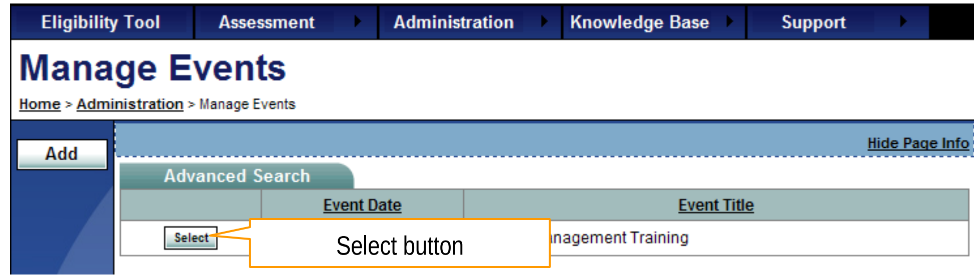
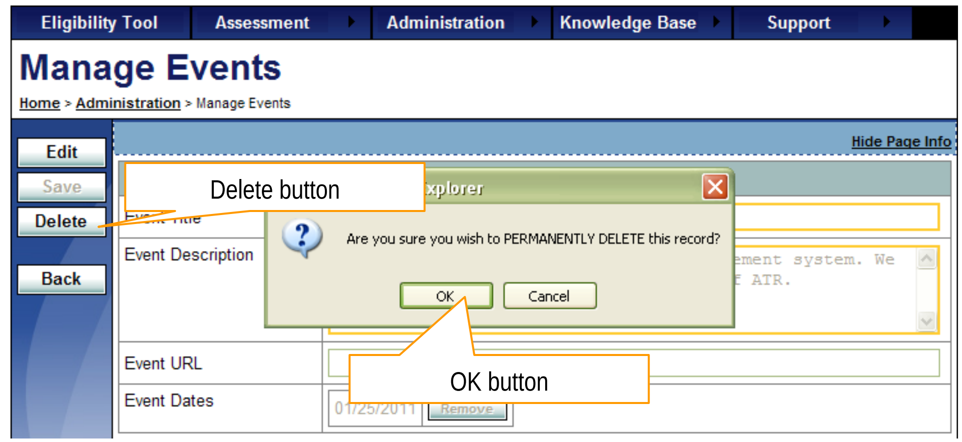
Deleting an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to delete by clicking the Select (**Select**) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)

4. Click the Delete (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the event.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.



(This is a partial screenshot of the Manage Events edit form)

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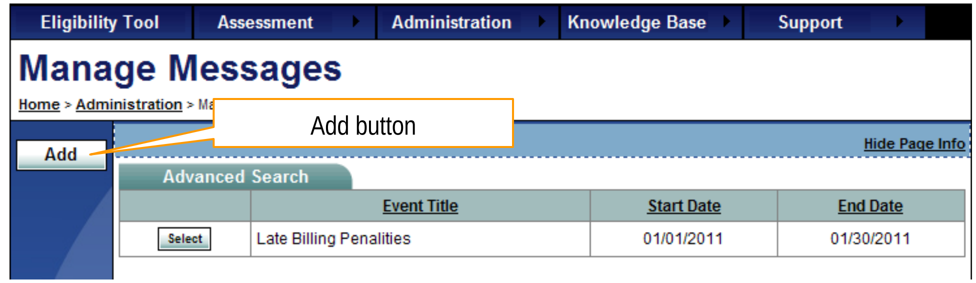
Manage Messages

The Manage Messages module is designed to add, edit or delete messages that display on the Home screen. Messages added at county level will only be viewed by that county and their providers.

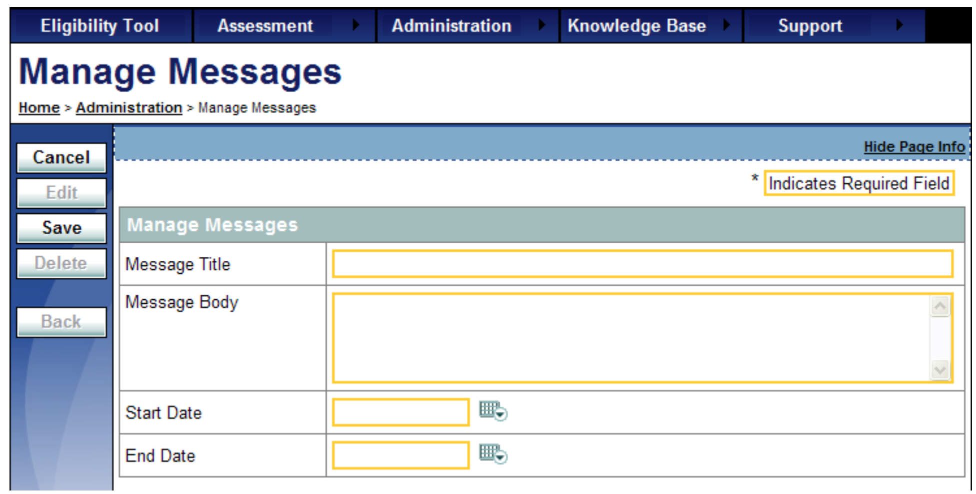
Adding a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Click the Add (**Add**) button from the left toolbar.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Enter a brief description of the message in the **Message Title** field.
5. Enter the description of the message in the **Message Body** field.
6. Enter the **From Date*** and the **To Date*** for when you would like the message to be displayed or select the dates by clicking on the calendar . (See [Calendar](#) section for further details)
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
8. Click the Back (**Back**) button to return to the Listing page.



(This is a screenshot of the Manage Messages edit form.)

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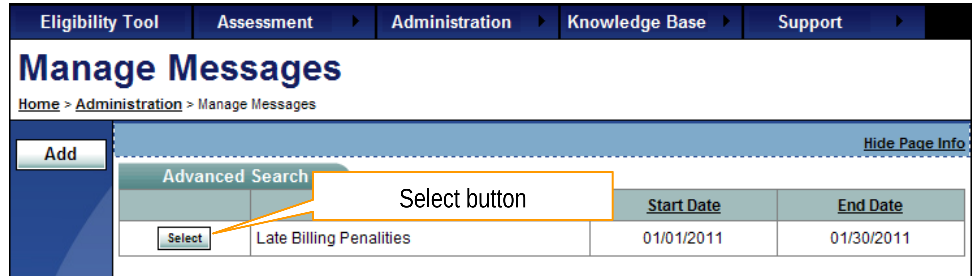
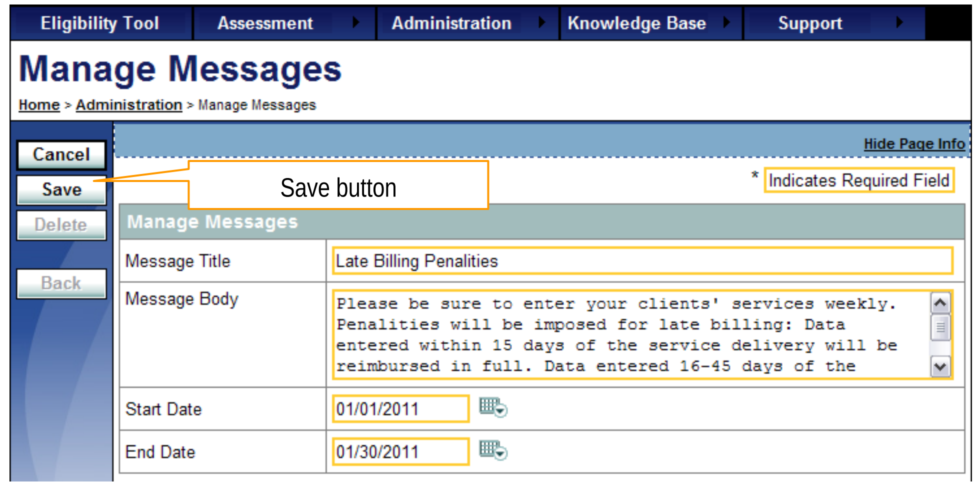
Editing a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page
3. Select the message you wish to edit by clicking the Select (**Select**) button to the left of the message title.



(This is a sample screenshot of Manage Messages Listing Page.)

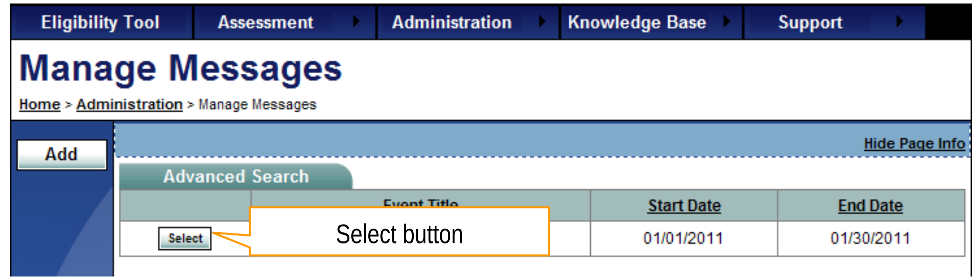
4. Click the Edit (**Edit**) button from the left toolbar.
5. The message will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Manage Messages edit form.)

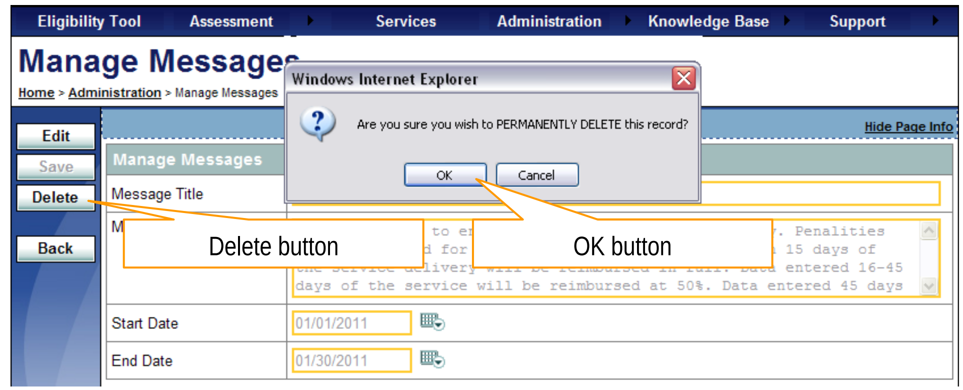
Deleting a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Select the message you wish to delete by clicking the Select (**Select**) button to the left of the message title.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Click the Delete (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the event.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.



(This is a sample screenshot of the Manage Messages edit form.)

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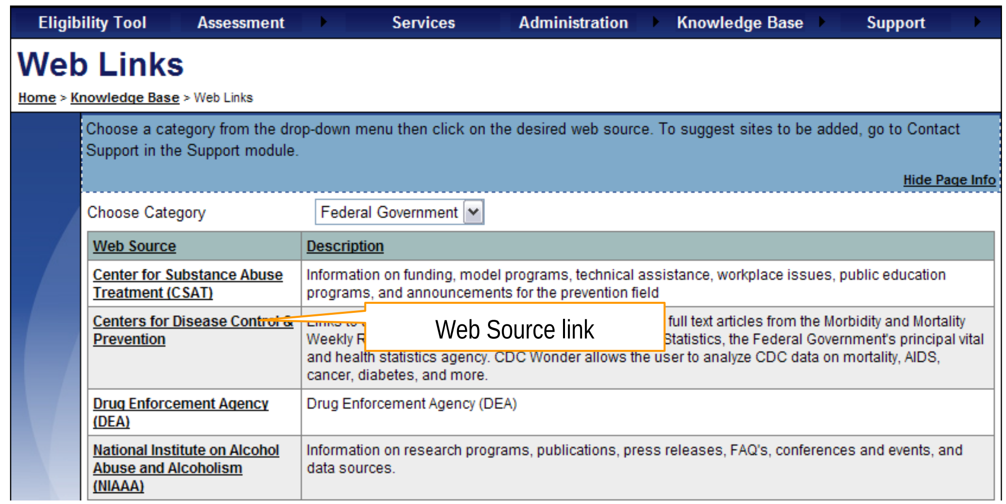
KNOWLEDGE BASE

The Knowledge Base module is a warehouse of documents and web source information designed to provide pertinent data.

Web Links

The Web Sources section of Knowledge Base is useful for finding a wealth of health and human service links. The Web Source section can be utilized by following these steps:

1. Click **Knowledge Base** from the Menu.
2. Click **Web Links** from the Knowledge Base Landing Page.
3. Select a category from the **Choose Category** dropdown list.
4. Browse the Web Sources List for the website you would like to visit.
5. Click on the link of the name of the **Web Source**.
6. A new window will open displaying the website you chose.
7. To close the new website window, click on the (X) in the upper right hand corner.



(This is a partial screenshot of the Web Links Listing Page.)

Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the websites.
- On the left column of the table is the Web Source link and on the right column of the table is a description of the website.

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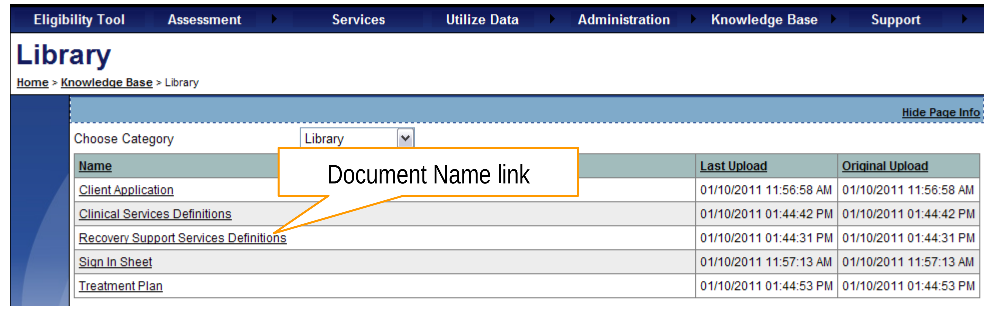
Library

The Library section is a repository of commonly requested documents and other general documents that ATR would like to make available. Use the following instructions to view the Library section.

1. Click **Knowledge Base** from the Menu.
2. Click **Library** from the Knowledge Base Landing Page
3. Select a category from the **Choose Category** dropdown list.
4. Select the document you would like to view by clicking the link of the document Name.
5. The document will open as a new word document.
    a. Click the print button to print the document.
    b. Click the disk button to save the document.
    c. To close the .doc window, click on the (X) in the upper right hand corner.



(This is a screenshot of the Library Listing Page.)

Tips

- The documents in the Library section are updated at the state-level.

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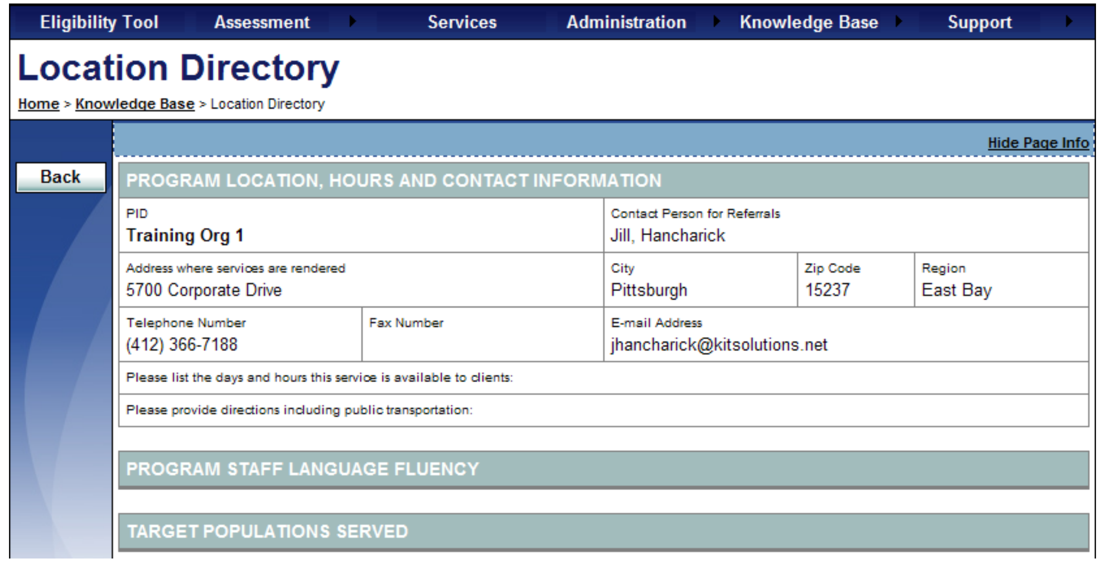
PID Directory

The PID Director section allows you to view details on the different program locations.

1. Click **Knowledge Base** from the Menu.
2. Click **PID Directory** from the Knowledge Base Landing Page
3. Click the Select (**Select**) button to left of the PID you wish to view.
4. The Program Location details will be displayed.



(This is a sample screenshot of the Location Directory Page.)

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Web Site

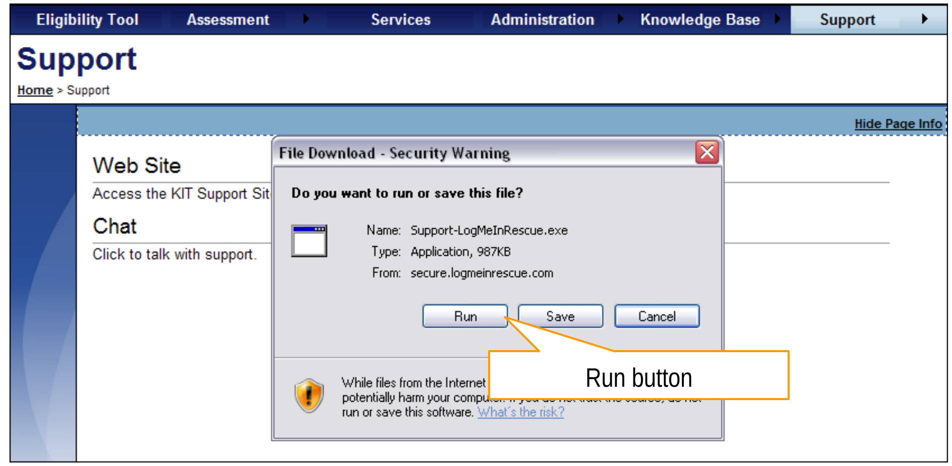
The RI ATR Support Site offers several features to assist you with using the RI ATR application.

1. Click **Support** from the Menu.
2. Click **Web Site** from the Support Landing Page.
3. A new window will open displaying the Support Site.
4. To submit a problem, question, or suggestion for improvement, click the **Contact Support** link.
5. To find this manual in an online version, click the **Manuals** link. The Manuals page will open displaying various documents pertinent to the RI ATR application.
6. To see a list of new features, improvements, or announcements for the RI ATR application, click the **What's New** link.
7. To view frequently asked questions regarding the RI ATR application, click the **FAQs** link.
8. To view and download documents pertaining to the RI ATR application, click the **Library** link.

(This is a screenshot of the Support Site Home page.)

Chat

The Chat feature allows you to talk to a Support member via instant message. Please note that Support is only available via chat from 9:00AM-5:00PM (EST), Monday-Friday.



(This is a sample screenshot of the LogMeIn file download message.)

1. Click **Support** from the Menu.
2. Click **Chat** from the Support Landing Page.
3. A new window opens prompting you to run the LogMeInRescue application. You must run this application in order to utilize the chat feature. Click the Run (**Run**) button.
4. A Support representative will be with your shortly.

Tips

- You will need to install the LogMeIn applet in order to connect with Support. This is a free download.
- The installation may take a few minutes.

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